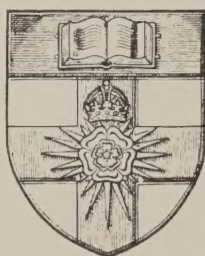


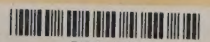
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ACCOUNTS AND PAPERS:

FORTY-FOUR VOLUMES.

— (35.) —

COMMERCIAL REPORTS—*continued.*

COMMERCIAL AND GENERAL INTERESTS—*continued.*

Session

11 February 1890 — 18 August 1890.

Ref
VOL. LXXV.

1890.

ACCOUNTS AND PAPERS:

1890.

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FOREIGN OFFICE.
1889.
ANNUAL SERIES.

N^o. 602.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1888
ON THE
TRADE OF TAHITI.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 319.

*Issued during the Recess and Presented to both Houses of Parliament
by Command of Her Majesty.*

LONDON:
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1889.

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89

Population.	The total population of the French establishments in the Eastern Pacific is therefore about 30,000. No census has been taken since the year 1887.
Government.	The French government is represented at Tahiti by an officer with the title of "Governor of the French Establishments in Oceania." He resides at Papeete, the chief town and port of Tahiti, and administers the general government of the islands above enumerated with the assistance of a council, composed of official members chiefly, with a small proportion of unofficial ones nominated by himself and confirmed by the Government of France.
General remarks.	The annexation to France in the early part of the year 1888 of the islands to the leeward of Tahiti has not had the desired effect of improving the trade of this Consular district. There exist various hindrances, including stringent shipping regulations, and an export duty of 13 per cent. ad valorem on all goods destined for that Group previously to their shipment from hence, which have, there is no doubt, crippled the extensive trade of those islands almost exclusively carried on with Tahiti. A very great depression in trade, chiefly due to a falling off in the prices of island products, and of which the immense difference between the imports and exports—viz., 55,000 <i>l.</i> —is a sure criterion, has been felt here during the year to which this report relates. Although some economists consider that the balance is favourable when the value of the imports exceeds that of the exports, that principal cannot, at least in this instance, be applied to the trade of these islands; in the first place, goods imported here are entered at invoice prices, and not, as is commonly the practice, at their cost on arrival enhanced by freight, insurance, profits, &c., whilst the exports are valued according to their wholesale prices at Tahiti. On the other hand, the absence of a bank, together with a deficiency of produce, compels importers to supplement their remittances by specie or French treasury drafts. The medium of circulation here is the debased Chilian and Peruvian silver coin which is not exported, but with which French and other gold and silver coins, less depreciated, are, not without any difficulty, owing to their scarcity, obtained at a very high rate of exchange. The excess of imports over exports explains the want of commercial bills, and the necessity of having recourse to the local government for drafts on Paris, which are only granted in small sums, and at very irregular intervals, in exchange for French currency with a slight premium. Hence a serious loss to the importers who, in determining the cost of their goods, have no basis on which to reckon interest. The French Government having disavowed the form in which were established the differential duties, which, owing to the incompleteness and irregularity in the drawing up of the tariffs, caused no little inconvenience to the merchants, the system termed "Octroi de mer," an ad valorem duty at present of 13 per cent., chargeable on imports generally, without distinction of origin or flag, has been reverted to, but it is more than likely that
Currency.	
Customs regulations.	

at no very distant period, a recurrence, indeed already in contemplation, to the former system, favouring French imports, will take place.

British trade at Tahiti is not at present very extensive. The principal mercantile house belonging to Mr. George Darsie, the remains, so to say, of the vast business of the late Mr. John Brander, in whose hands was nearly the whole of the lucrative trade of the Society, Georgian and Cook Islands, is evidently with the object of liquidating, curtailing, and gradually disposing of its extensive business in this and the neighbouring islands.

The total invoice value of the imports in 1888 amounting to 130,000*l.*, shows an excess of about 14,000*l.*, as compared with that of the preceding year, a result not to be entirely depended upon, different rates of duties having been levied during the year.

Goods from Great Britain came out by the way of New Orleans and Panama to San Francisco. There has been no direct shipment from the United Kingdom. The customs statistical returns for the past year being incomplete, I am unable to furnish the return of principal articles of import, and to complete the subjoined table showing the countries from whence they were imported.

The following is an approximate statement of the Tahitian and other South Sea Island products exported from Tahiti in the years 1887-88 with their value according to the average wholesale prices during the year.

RETURN of Principal Articles of Export from Tahiti during the Years 1887-88.

Articles.		1888.		1887.	
		Quantity.	Value.	Quantity.	Value.
Cotton, clean and baled	Lbs. ...	348,134	11,604	487,166	15,224
Cotton seed	Tons ...	103	185	781	1,406
Copra	" ...	2,346	23,460	3,307	39,684
Mother-of-pearl shell...	" ...	387	23,220	271	20,325
Fungus, edible for China	Lbs. ...	51,791	755	94,785	1,382
Oranges...	Number	3,482,000	2,786	4,929,000	3,943
Cocoa nuts	" ...	696,854	2,091	669,400	1,980
Vanilla	Lbs. ...	12,869	5,028	7,610	3,044
Wool, from Easter Island	" ...	13,254	276	45,485	948
Lime juice	Gallons...	4,279	178	8,987	374
Bees-wax	Lbs. ...	2,049	85	4,885	192
Dessicated cocoa nut...	" ...	107,148	2,679	110,526	2,763
Coffee	" ...	...	...	50,259	1,990
Arrowroot	" ...	...	...	4,026	34
Hides	Number	591	236	1,104	442
Pearls and other articles, estimated value ...	...	...	2,399	...	6,269
Bêche-de-mer...	Lbs. ...	2,195	18	...	...
Total	...	...	75,000	...	100,000

As compared with 1887, there is a decrease of 25,000*l.* in the exports of baled cotton, cotton seed, copra, fungus, oranges, wool, and other articles, of which the principal are pearls.

Cause of
decrease in
exports.

The decrease in cotton seed is consequent on that of cotton, and the great falling off in the quantity of copra exported is, it may be stated, almost entirely due to the crisis which still prevails at the islands to the leeward of Tahiti, as also to the diversion towards the Australasian colonies of the traffic with the Cook Group.

Destination
and value of
exports.

The subjoined table shows the different countries to which the products were exported with their respective values. With the exception of an estimated value of 2,00 l. of pearls, mostly forwarded by post, the exports to France were effected by an important German firm established here and having factories in the adjacent islands, in two German and one French bottoms.

As regards the exports to the United States, they comprise 153,740 lbs. of baled cotton, and 121,617 lbs. of mother-of-pearl shell of the value, respectively, of 5,125l., and 3,300l., which doubtless have been re-shipped to Europe, although for the latter product there is sometimes a favourable market in San Francisco and New York, and notwithstanding that quotations are lower, the net proceeds differ but little, for the reason that shells are not, as in Liverpool and London, sorted before being sold.

Shipments of cotton and shell to Europe by the way of San Francisco are reforwarded in sailing vessels at such low rates of freight, that for those commodities that route is resorted to in preference to the sailing vessels from hence direct to ports in the United Kingdom or Continent.

A lot of 79 tons of mother-of-pearl shell of the value of 4,740l. shipped to Auckland, New Zealand, has no doubt been reforwarded to London by steam.

Return of
exports and
imports, 1887-
1888.

TABLE showing the Total Value of all Articles Exported from Tahiti and Imported to Tahiti from and to Foreign Countries during the Years 1887-88.

Country.	Exports.		Imports.	
	1888.	1887.	1888.	1887.
	£	£		£
Great Britain	11,446	40,052	No Returns published.	1,600
Australia and New Zealand	7,561	3,538	Total amount	16,000
France	21,345	..	130,000l.	88,700
United States	22,725	25,465	Naval stores	..
Germany	7,503	..	and provisions	..
Portugal	..	16,605	for the local	900
Chile	4,400	8,071	government of	..
Other countries	..	6,269	the value of	
			5,450l. only are	
			not included in	
			the above total.	
Total	74,980	100,000	130,000	116,200

The foregoing table does not include the imports in 1887 and 1888 of South Sea Island products, most of which, being exported afterwards, figure, however, in the table of exports, nor the value of provisions, naval stores, coal, &c., received by the local government, and amounting in 1887 to 24,000*l.*, and in 1888 to 5,450*l.*

The returns of imports previously referred to will form the subject of a supplementary report, which I will transmit so soon as I am in possession of the necessary details.

A monthly mail service is performed by three sailing vessels of 300 to 400 tons, under the American flag. They sail from this port from the 12th to the 15th, and from San Francisco from the 1st to the 5th of every month. The average length of the passages may be given as follows :—

	Days.
From hence to San Francisco direct	35
From San Francisco to Tahiti, via Taiohai, in Nukahira, one of the Marquesas Islands	30

A yearly subsidy of 75,000 fr. is paid to the contractors, an American firm established here. The contract, which will expire December 31, 1890, contains a proviso to the effect that either party may terminate it by giving four months' notice. This clause was inserted at the instance of the French local government with the hope evidently of making some arrangement for a steam communication.

In view of the opening of the Isthmus of Panama, as regards which sanguine hopes are entertained by the French authorities, a technical commission was in August last appointed to study and report on a project of erecting lighthouses in the Tuamotu Group on islands lying in proximity to the track of steamers expected to pass through that dangerous archipelago.

A regular five-weekly steam communication exists between this island and Auckland, N.Z. The service is performed by a steamer, under the British flag, of about 500 tons net, very comfortably fitted for passengers. On the passage hither, she calls at Tonga and Samoa, and on her return to New Zealand at Rarotonga and Tonga, and occasionally at the Leeward Islands. During the orange season she proceeds to ports on the coast to load a cargo of fruit.

The local administration has entered into an agreement with the British firm of Messrs. Donald and Edenborough, of Auckland, N.Z., having a branch at Tahiti, for a parcel post service, which, when in operation, will certainly be a boon to the community.

The subjoined table shows a decline in the shipping inwards and outwards of all nations during the year 1888, the natural result of the falling-off in the exports.

Parcel post.
British and foreign shipping.

RETURN of all Shipping at the Port of Papeete, Tahiti, in the Year 1888.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	2,808	8	3,800	12	6,608
Tahitian, foreign						
going	15	924	1	50	16	974
Coasters	99	6,133	40	2,000	139	8,133
French	4	2,626	...	...	4	2,626
United States ...	21	4,504	...	...	21	4,504
German	4	1,254	...	...	4	1,254
Other countries ...	22	2,389	...	...	22	2,389
Total	169	20,638	49	5,850	218	26,488
" for the year preceding ...	180	24,764	57	6,302	237	31,066

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	1,803	8	3,800	12	5,603
Tahitian, foreign						
going	17	1,050	1	50	18	1,100
Coasters	95	5,922	40	2,000	135	7,922
French	3	2,023	...	...	3	2,023
United States ...	23	4,875	...	...	23	4,875
German	4	1,245	...	...	4	1,245
Other countries ...	25	3,104	...	...	25	3,104
Total	171	20,031	49	5,850	220	25,881
" for the year preceding ...	174	24,366	58	6,552	232	30,178

The coasting trade of Tahiti and its dependencies is exclusively reserved to vessels carrying the French flag, and registered at this port.

Charges on shipping. The charges in this port on merchant vessels are as specified hereunder, the rates being alike for all flags.

Sanitary Dues—

For every vessel boarded by the Health Officer, 1½*d.* per ton measurement.
Ships of war, coasters, and vessels not required to be provided with a Bill of Health are exempt.
Mail vessels are subject to an annual fixed charge

Pilotage Dues (into or out of Port)—

1. Merchant vessels :—	<i>s.</i>	<i>d.</i>	
The first 100 tons	3	1	} Per fraction of 10 tons.
" next 300 ton	2	8	
" " 100	2	3½	
" " 500 " and upwards ..	1	1½	

Vessels entering or leaving port without a pilot are charged half pilotage according to the above rates.

Vessels under 30 tons, of whatever nationality, are exempt from pilotage dues.

2. Foreign ships of war (inwards or outwards) :—	<i>£</i>	<i>s.</i>	<i>d.</i>
A line-of-battle ship	9	12	4
A frigate	7	13	10
A corvette	5	15	5
Ships of an inferior class	2	17	8

French ships of war are exempt from pilotage dues.

3. Yachts are treated as foreign men-of-war.

4. For every movement in the harbour with the assistance of the pilot, 15s. 5d.

Wharfage—

	s.	d.
Vessels under 100 tons, per diem and per ton ..	7	8
Vessels of, and above 100 tons, per diem ..	7	8
Space occupied on the wharves by merchandise, per diem, and per square metre, at the expiration of eight days	7	8

Lighthouse Dues—

Per ton measurement, and per voyage, 2½d.

Coasters have the option of paying a yearly charge of 9½d. per ton measurement. Exemption for vessels putting in for provisions or to refit.

In addition to Papeete, the following ports are at present open to foreign trade and shipping, namely:—

Ports open to trade.

Port Phaëton, on the south side of the Isthmus of Tahiti; Papeuriri, on the south side of the Island of Tahiti; Puen, on the north side of the Isthmus of Tahiti; Papeari, on the south side of the Island of Tahiti; Vairao, on the south side of the Isthmus of Tahiti; Papetoai, on the north-west side of the neighbouring Island of Moorea, or Eimeo; Rotoava, entrance on the north side of the Lagoon Island of Fakarava, in the Tuamotu group; Tubuai, north side of the Island of that name; Rikitea, on the east side of the Island of Mangarera (Gambier Group); Taiohae, on the south south-east side of the Island of Nukahiva (Marquesas Group).

No regulations affecting foreign shipping at the different ports of the Islands to the leeward of Tahiti have been published, but from the decrees requiring the prepayment at this place of the duties on goods shipped to that group, it would indeed be inferred, although the native laws have not been superseded, that they are not open to direct foreign trade and shipping.

The published budget estimates the local revenue of the French possessions in Oceania for the year 1888 at about 40,000*l.*, and the local expenditure at the same sum. The cost of the naval and military establishments maintained at these Islands is borne by the French Treasury.

Local budget.

In addition to the duties described in the annual report for 1887, and which, with the exception of the differential tariffs in force only for the short period of about three months, continued to be levied during the ensuing year, the following specific duties have been established on the undermentioned articles:—

Customs duties.

First Category.

	£	s.	d.
Pianos	0	19	2 each
Two-wheeled carriages	0	15	5 „
Four-wheeled carriages	1	10	10 „
Waggons	0	7	8 „
Carts	0	3	10 „

Second Category.

	£	s.	d.
Fancy carriages, imported for the purpose of being hired out	0	7	8 each
Ordinary carriages, imported for the purpose of being hired out. . . .	0	3	10 „
Carts, for agricultural purposes ..	0	1	11 „

The duty of 25 c. ($2\frac{1}{4}d.$) on beer and wines of all sorts is only levied on bottled beer and wine, which when in casks are admitted duty free.

The ad valorem duty on petroleum is only $\frac{1}{2}$ per cent. instead of 12 per cent. as stated in last year's report.

The following articles enjoy, besides those enumerated in the report for the year 1887, exemption from duty:—Unwashed wool, books, newspapers, pamphlets, periodical issues, materials for building or repairing vessels, sacks, cases, and all packages for the export of island products.

Grain is not, as stated in the same report, free from duty. The vexatious ad valorem duty on all coins imported in packages ("à l'état de group") other than the coins legally current in France, is in revival in consequence of the abolition of the differential tariffs in which it was, inadvertently perhaps, omitted.

With the exception of coffee, unless exported, mother-of-pearl shell is the only island produce subject to duty. The duty, termed "Droit de chargement," of 1*l.* 10*s.* 10*d.* per ton, is levied on the arrival here of the shell from the diving grounds.

Towage
tariff.

The charges for towage of vessels in and out of the port of Papeete, by a steam tug of 50 tons under the French flag, but owned by a German firm established here, are as follows:—

Towage in or out, at a distance of three miles from the anchorage of the tug:—

				£ s. d.		
Vessels of, and under 100 tons	..	..	..	3	17	0
" " 101 to 150 tons	..	..	..	5	15	6
" " 151 " 200 " "	..	..	..	6	14	9
" " 201 " 250 " "	..	..	..	7	14	0
" " 251 " 300 " "	..	..	..	9	12	6
" " 301 " 400 " "	..	..	..	11	11	0
" " 401 " 500 " "	..	..	..	13	9	6
" " 501 " 600 " "	..	..	..	14	8	9

Special arrangements have to be made with the master or the owners of the tug for the towage of vessels over 600 tons.

Shipping
resources.

A patent slip, worked by steam, capable of taking up vessels of 300 tons, and about 100 feet in length, and careening quays, are the only facilities in this port for repairing ships. I learn that the local government intend lengthening the slip to its original dimensions corresponding to vessels of about 500 tons. A heavy swell in the beginning of this year caused great injury to the careening quays, but I believe that they will soon be repaired. In their present state, unprovided as they are with all the requisite appliances, and heaving down moorings, they are unserviceable.

The charges for the hire of the slip and heaving down appliances to merchant vessels, are as follows :—

	First Day.	Following Days.
1. <i>Slip Hire</i> —	£ s. d.	£ s. d.
Vessels under 50 tons	3 17 0	1 18 6 per day
Vessels of 50 tons and upwards, per ton measurement	0 1 6	0 0 9 "
2. <i>Hire of Appliances</i> —	Per Day.	
Careening apparatus, No. 1 ..	1 14 7	} The apparatus includes three heaving down tackles
" " " 2 ..	1 3 1	
A hawser, warp or parbuckle ..	0 7 8	} Per day and per ton measurement
A lighter	0 0 9	
A diving apparatus	0 7 8	
A pump		
A punt		
A movable capstan		
A chain, one shackle at least ..		
An anchor	0 3 10	
A handcart		
A tackle		
A spar		
A stage		
A jackscrew		
A wheelbarrow		

The average rate of wages for seamen engaged in this port may be stated to be from 3*l.* to 4*l.* per month.

The wages of a shipwright, as well as those of mechanics, in general, are, on an average, about 12*s.* a day.

The customary fees of surveyors, for surveys under consular warrant, are as follows :—

	£ s. d.
For surveying a ship, each surveyor ..	3 1 7
For surveying the steerage or hatches of a ship, each surveyor	1 10 9
For surveying damaged goods, not exceed- ing ten packages, each surveyor	0 19 2
For every additional ten damaged packages each surveyor	0 19 2

Fees of
surveyors.

Under this head I have to report an unfavourable result for Agriculture. the year that has elapsed.

The cultivation of cotton, the staple product of this island, has been almost entirely abandoned, and, notwithstanding that prices have of late been more remunerative, there is, instead of a progress, a decline to note.

The two cotton ginning mills which, in former years, were almost constantly at work will, unless, labour being cheaper, cotton is cultivated on a more extensive scale, certainly be at a standstill.

The cultivation of sugar cane has likewise been neglected, and in spite of a protective duty, a considerable quantity of brown sugar, competing successfully with Tahiti sugar, is imported from Fiji by the way of New Zealand.

As anticipated, the stimulus consisting of prizes delivered on the day of the anniversary of the French Republic has simply had

the effect of giving an impulse to agriculture during the few preceding months, but soon followed by a keen stagnancy. There has been a little increase in the quantity of vanilla exported, which, doubtless, would command better prices were it not that a number of beans stolen and picked green are not dried in the ordinary process, but are placed in ovens and afterwards sold and mixed with the superior quality of vanilla.

Copra. There has been a falling-off in the quantity of copra made at Tahiti, the sale of the nuts to the dessicated cocoa-nut manufacturers realising better prices.

Although pasturage is abundant on the Island, cattle have to be brought here from the neighbouring group of the Marquesas Islands. The animals being slaughtered soon after they arrive, beef is tough. Pigs and fowls are also brought to this market from the surrounding islands.

Fine cattle are sometimes imported from New Zealand.

Prices of provisions. AVERAGE Market Prices of Provisions of Local Consumption.

Articles.	Prices.	Weights or Measures.
Beef	10 <i>d.</i>	Pound.
Cattle.. ..	6 <i>d.</i>	"
Mutton	10 <i>d.</i>	"
Sheep.. ..	16 <i>s.</i> to 1 <i>l.</i> 7 <i>s.</i>	each.
Tahiti beer	6 <i>s.</i>	dozen.
"	6 <i>s.</i> 8 <i>d.</i>	Keg of about 5 gallons.
Imported beer	13 <i>s.</i> 4 <i>d.</i>	dozen.
Pork	8 <i>d.</i>	pound.
Live pigs	3½ <i>d.</i> to 4 <i>d.</i>	"
Fowls.. ..	1 <i>s.</i> 4 <i>d.</i> to 2 <i>s.</i>	each.
Eggs	1 <i>s.</i> 4 <i>d.</i> to 2 <i>s.</i>	dozen.
Turkeys	16 <i>s.</i> to 27 <i>s.</i>	each.
Ducks.. ..	2 <i>s.</i> 8 <i>d.</i> to 5 <i>s.</i>	"
Geese	16 <i>s.</i> to 27 <i>s.</i>	"
Peacocks	16 <i>s.</i> to 27 <i>s.</i>	"
Fish	2 <i>d.</i> to 4 <i>d.</i>	pound.
Flour	1½ <i>d.</i> to 2 <i>d.</i>	"
Soft bread	2½ <i>d.</i>	"
Fresh vegetables	½ <i>d.</i> to 1 <i>d.</i>	"
New Zealand potatoes	1½ <i>d.</i>	"
Potatoes, Cal.	1½ <i>d.</i>	"
Onions	4 <i>d.</i>	"
Milk	6 <i>d.</i>	Litre bottle.
Butter in kegs	1 <i>s.</i> 5 <i>d.</i> to 2 <i>s.</i>	pound.
Butter in tins	1 <i>l.</i> 4 <i>s.</i>	dozen.
Bacon.. ..	9 <i>d.</i> to 10 <i>d.</i>	pound.
Cal. ham	11 <i>d.</i>	"
Montferrand wine	8 <i>l.</i> 7 <i>d.</i>	cask.

Climate. The sanitary state of the town and port of Papeete is good. The climate is healthy, serious epidemics rarely appearing in the country.

The wet season commences in November or December, and continues until March or April, when heavy rains, with thunder and lightning, are frequent, and strong northerly and westerly

gales may be looked for, but from which this harbour is well sheltered by the belt of reef which encircles the island. From June till October—the period termed the dry season—rain is scarce and the weather generally clear.

The hottest months are January, February, March, and April—the coolest June, July, August and September.

The mean temperature is about 76° of Fahrenheit.

The only hospital at Tahiti is the military hospital, in which Hospital. are admitted foreign seamen, the cost of treatment being about 7s. 5d. per day.

French and foreign residents are also, upon certain formalities, admitted and treated as the officials, at a daily charge of about 11s.

During the year 1888 the rate of exchange upon England was Rate of
26 fr., or 6 Chilian or Peruvian dollars to 1*l*. The current rate of exchange.
interest on money is twelve per cent. per annum. Interest.

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FRANCE.

SUPPLEMENTARY REPORT FOR THE YEAR 1888
ON THE
TRADE OF TAHITI.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 602.

*Issued during the Recess and Presented to both Houses of Parliament
by Command of Her Majesty.*

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558. Varna and Bourgas	1d.	620. Nice	1d.
559. Thessaly	½d.	621. Kiukiang	½d.
560. Yokohama	1d.	622. Paris	1d.
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567. Roustchouk and Philippopolis	1d.	629. Bushire	2½d.
568. Stockholm	1½d.	630. The Hague	½d.
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Reference to previous Report, Annual Series No. 602.

FRANCE.

TAHITI.

Acting-Consul Miller to the Marquis of Salisbury

My Lord,

Tahiti, November 14, 1889.

WITH reference to my despatch, dated the 15th of June last, I have the honour to submit to your Lordship herewith a supplementary Report on the Trade of Tahiti and its Dependencies for the year 1888.

I have, &c.

(Signed) GEORGE MILLER.

Supplementary Commercial Report for Tahiti for the Year 1888.

In continuation of my report upon the trade and navigation of Tahiti and its dependencies for the year 1888, I subjoin the table, completed, of the value of all articles exported and imported from and to Tahiti during the years 1887 and 1888, and also a return of the principal articles of import during the latter year. Returns of imports and exports

The table of imports is of little interest, as it does not show the value of those from Great Britain, for the reason that there was no direct shipment, and that the goods that came out by way of New Orleans and Panama to San Francisco and via Auckland and Hamburg were entered as of the production or manufacture of the last port of shipment.

Through the courtesy of the customs authorities I have been enabled to draw up the return of the principal articles of import. It led me to discover that the island products, amounting to 7,500*l.*, brought hither from islands not under the sovereignty or protection of France, are included in error, under the head of "Other countries," in the return embodied in my report dated the 15th of June, 1889, which stated that it did not include any South-Sea Island products.

The rate of wharfage for vessels under 100 tons, per diem and per ton, is 1*d.*, and not ½*d.*, as stated in the writer's previous report. Wharfage—error in previous report.

(788)

Duty on transit goods for Rurutu and Rimatara.

It is intended to extend to the islands of Rurutu and Rimatara, recently placed under the protection of France, the measure lately adopted with regard to the islands to the leeward of Tahiti (Huahine, Raiatea, and Borabora), whereby all transit goods exported thither from hence are exempt from specific duties, leaving to infer that they are likewise subject to the prepayment at this place of an ad valorem duty of 13 per cent.

Steam mail service.

Great efforts are being made by the local government to inaugurate a steam mail service. The governor of the French establishments in Oceania, Mr. Lacascade, who left Tahiti a few days ago, proceeding to France by the way of Auckland, New Zealand, is to negotiate at this latter port to that effect.

Introduction of coolies.

In spite of the keen (but not altogether unfavourable) competition that the Chinese offer to foreign traders, the local government and the General Council seem disposed to accede to a request made by an American citizen, owner of a cotton ginning mill at this place, to introduce 200 coolies (Chinese), most of whom will doubtless, at the expiration of their contracts, settle on this island as traders or agriculturists.

RETURN of Principal Articles of Import to Tahiti during the
Years 1887-88.

Articles.		1888.		1887.	
		Quantity.	Value.	Quantity.	Value.
Live stock			£ 3,889		£
Salt provisions			9,359		
Flour	Lbs.	3,384,416	11,066		
Rice			885,588		1,651
Biscuit			364,203		2,731
Potatoes			262,337		435
Beans			54,868		212
Refined sugar			205,674		2,487
Brown			565,204		392
Tea...			9,748		465
Coffee			274,504		890
Olive oil	Gals.		970		390
Dessert biscuits	Lbs.		11,442		227
Vegetables, preserved			1,207		
Macaroni and vermicelli	Lbs.		5,454		113
Onions			66,922		216
Wheat			73,055		210
Barley			451,145		830
Oats			70,682		21
Bran			682		125
Opium			49,424		517
Wine in cask, red			1,012		4,307
Red wine, in bottle			2,358		237
White wine, in cask			90		268
White " in bottle			540		27
Champagne			1,190		300
Absinthe			823		500
Vermouth			744		172
Gin...			316		107
Rum			100		53
Whisky			510		27
Beer			145		500
Bitters			48		50
Amer Picon			580		9
Liqueur, assorted			1,279		174
Cognac			59		356
Kirsch			84		15
Other liquors			23		22
Vinegar			803		61
Alcohol			53		11
Mineral waters	Cases		79		89
Linseed oil	Gals.		3,353		396
Essence of turpentine			492		54
Oils					60
Coals	Tons		4,867		3,295
Bricks	Mil.		13		54
Cement	Lbs.		50,688		182
Iron					306
Timber					4,375
Hay	Lbs.		11,550		29
Drugs					753
Paints					758
Perfumery					800
Soap					2,070
Tobacco and cigars					1,279
Matches					693
Calico					1,850
Parous					3,293
Denims					1,450
Silks					2,317
Muslins					484
Prints					6,414
Other cloths					3,867
Ship's stores					2,503
Other articles					45,960
Value of provisions, naval stores, coals, &c., for local govern- ment			5,450		
Total			122,500		

No Official Returns published.

No Official Returns published.

TABLE showing the Total Value of all Articles Exported from Tahiti and Imported to Tahiti from and to Foreign Countries during the Years 1887-88.

Country.	Exports.		Imports.	
	1888.	1887.	1888.	1887.
	£	£	£	£
Great Britain	11,466	40,052	..	1,600
Australia and New Zealand	7,561	3,538	19,903	16,000
France	21,345	..	21,000	14,000
United States	22,725	25,465	78,322	83,700
Germany	7,503	..	..	..
Portugal	..	16,605	..	..
Chili	4,400	8,071	1,418	900
Other countries	..	6,269	1,857	..
Total	75,000	100,000	122,500	116,200

The foregoing table does not include the imports in 1887 of South Sea Island products, most of which being exported afterwards figure, however, in the table of exports, nor the value of provisions, naval stores, coals, &c., received by the local government, and amounting in 1887 to 24,000*l.*, and in 1888 to 5,450*l.* only.

Products imported in 1888 from islands other than those under the sovereignty or protection of France, and amounting to 7,500*l.*, are erroneously included under the head of "Other countries" in the return embodied in the report dated June 15, 1889.

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FRANCE.

REPORT ON THE
AGRICULTURE IN THE DISTRICT OF LA ROCHELLE.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 561.

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551. Baghdad	½d.	609. Havana	2d.
552. Fiume	1d.	610. Frankfort	½d.
553. Mogador.. ..	2d.	611. Tabreez	½d.
554. Buenos Ayres	1½d.	612. Bilbao	1d.
555. San Francisco	2½d.	613. Barcelona	½d.
556. Carthagena	½d.	614. Tokio	1d.
557. Syra	1d.	615. Naples	2½d.
558. Varna and Bourgas	1d.	616. Batoum.. ..	½d.
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No. 618.

Reference to previous Report, Annual Series No. 561.

FRANCE.

LA ROCHELLE.

Acting-Consul Dickie to the Marquis of Salisbury.

My Lord,

Nantes, September 30, 1889.

I HAVE the honour to transmit herewith to your Lordship a Report on Agriculture, received from Mr. Vice-Consul Warburton at La Rochelle.

I have, &c.
(Signed) H. ELFORD DICKIE.

Report on Agriculture and the increasing demand for Agricultural Implements in the District of La Rochelle.

Although this is an unusually early period for sending in a report on agricultural matters, the circumstances of my district are such that a short one at this date is likely to be more useful to British trade than a more elaborate one at the usual time.

The most important feature in the agricultural position here is the change which is being established in the mode of tillage from the old and obsolete processes to something more in accordance with modern ideas, and the consequent demand for improved machinery and implements. Demand for modern implements.

I have already referred to this in my report for 1888, published last May, and now that the year's farming operations are nearly over, and that I have been able to obtain from the persons who have been instrumental in introducing these implements the results of their experience, I give some further particulars and suggestions, which I hope will be found useful to any manufacturers of them in England who may wish to obtain a share of this new and promising trade.

To understand the great change which is taking place in the agriculture of this district, it is necessary to remember that up to 1875 it owed its prosperity entirely to its vineyards. Cause of this demand at present.

In that year, out of about 800,000 acres under tillage, 423,000 acres were under vines, the value of which was estimated
(761)

at nearly 23,000,000*l.*, and the annual value of the crop may be imagined from the fact that the amount of wine produced was 120,000,000 gallons.

Next in importance, but of comparatively little value, was the acreage under wheat, which was 350,000 acres, and so little skill was employed in growing this crop that the average return per acre was only about 12 bushels.

This mattered little so long as everyone made money out of grapes, but now that they can no longer do so, owing to the destruction of the vineyards by phylloxera, not only have they to turn the immense amount of land formerly under vines to growing grain crops, but also to make a livelihood out of it, as well as out of the large acreage already under wheat, which, of course, is impossible at present prices with so small a return as 12 bushels per acre.

For some years there has been great suffering amongst farmers, who have been losing money and living on their savings, but these are now exhausted, and starvation stares them in the face, unless they can either get the amount of protection necessary to enable them to exist, or else by reducing the expenses of cultivation and increasing the returns, manage to turn a loss into a profit.

Their own idea is a large protective duty, and that of the Government and of their best friends is to get them to try first what they can do by getting more out of the land, and this is what the new agricultural societies are now working for.

The task has been a difficult one, and it is only by the greatest persuasion that they have been able to get the peasantry to consent to use the improved machines provided for them; but they have succeeded in it to a considerable extent, and as the results are becoming apparent, farmers are hurrying to avail themselves of the advantages offered, and thus the demand is arising, to which I have already called attention, for a kind of article which the United Kingdom is peculiarly well fitted to supply from the long start it has had in making them, and the perfection and low price to which they have been brought.

With these advantages it only requires energy in pushing them, and attention to the requirements of the country, to enable English makers to get this trade where they have not done so, and to keep it where they have.

The best thing I can, therefore, do at present is to mention where they have succeeded, and where they have either lost the market or failed to get it from neglecting to suit themselves to the wants of their customers.

Articles in
which English
makers have
the monopoly.

Taking, first, the articles in which we have so far an incontestable superiority, I begin with agricultural machines as distinguished from implements, and in these we do almost all the trade down here.

I have no means of ascertaining the business done by private firms, which must be very large, but I am able to give the experience of the agricultural syndicate here, and of a new co-operative society started in connection with it.

These societies have in the short time they have been working sold 450 mowing machines, 15 reaping machines, and 11 reaping and binding machines. Proportion sold of English machines against others.

Of the 450 mowers, all are English except six, which are of French make. Of the 15 reapers, all are English. But of the reapers and binders, only two are English, and the other nine American.

It will be seen from this that here we have no competition to fear from French makers up to now, and I am informed that the use of the small number abovementioned has only strengthened our position by the comparison between the two. Superiority of the English.

They appear to be inferior imitations of English machines by makers who have not had much practice in this line, and I believe that without great practice and experience it is impossible to produce a machine of this kind that will last, and without entering into details as to the results given by the French ones, I will only say that so far as I can ascertain of the 444 English, not one has required repairs from any fault in construction, or anything to be done to it beyond the usual changing of the parts, which always have to be renewed from time to time.

Almost all that I have seen in use are by two celebrated English makers, whose names I need not give, but who owe their success to their enterprise in pushing their goods, and to the goodness of their work in keeping the customers they have gained.

One of these firms alone has a branch house in Paris, and, besides supplying two of the most important agricultural syndicates in this district, has no less than seven other good agents, in addition to which one of the members of the firm visits this country at least twice in the year. Result of personal attention in pushing the sale of goods.

This is the proper way to do business, and that which I have been pressing on our manufacturers for some years past, and as a consequence this house does about three times the amount of any other, and could have done more this year, only that they were unable to supply the unexpectedly large number of orders they received.

There is little chance of their losing this business, and they will probably be able to increase it as much as they please, for in answer to my enquiries as to whether buyers of them had any suggestions to make, or wished for any alterations in the machines, the answer was "No!" that they consider them "perfect."

The only competition at present probable seems to be from American machines, of which it will be seen that there have been nine reapers and binders sold, against only two English.

As to this I find on enquiry that there is no complaint against the English; that both are equally good, and much the same in price, with, perhaps, a small difference in favour of American, owing to the fact that carriage from New York to La Rochelle costs less than from England to La Rochelle; but the reason why the Americans have sold more is that they consigned them to the society for sale, which the English did not do, and the farmers, Advantage of consigning goods for sale.

finding them ready, took them, sooner than wait for others to be ordered.

The moral of this is that English makers should do likewise.

Articles in which English makers have lost the trade of this district. I now come to the articles in which our people have lost the market in competition with French.

Ploughs. This is the case with ploughs, because they would not take the trouble to find out and make what the farmers here require.

They used to send over a heavy plough, made of iron, which broke easily, while what is wanted is a very light and strong one made of steel.

The French makers, seeing this, cut in and took the matter up, and are now making them to give every satisfaction; so that, if our makers want to get back this business, they must either beat them in price or make better ones, and here I may mention that the price the society are now paying for these French ploughs is about one shilling per kilogramme of weight (equal to 2 lbs. 3½ ozs.).

The other implements, such as harrows, shovels, &c., are scarcely worth mentioning, as they can be made cheaply by local workmen; but any persons looking round for English houses would, of course, make it their business to ascertain if they could do anything in this direction.

I cannot do more than suggest to them the possibility, leaving them to work it out for themselves.

Chemical manures.

In the matter of chemical manures, again, the English have pretty nearly lost the market, and in answer to my inquiries, why? I am told that it is not from any fault in the article supplied, but because they have not adapted themselves to the requirements of their customers, and they are now to a great extent replaced by French ones.

This is a pity, for the trade now doing is a colossal one in this department. One reason given me by buyers here, why they have had to supply themselves from French houses, is that the English will not sell them at a fixed strength and price.

For instance, they quote their super-phosphates at an uncertain price, say 5s. to 6s. for an uncertain strength of from 10 to 12 degrees. This has, then, to be tested to ascertain the number of degrees after it arrives, and the price fixed accordingly, so that the buyer is made to take it at one time at a higher price, and another a lower one, according to the results of the analysis.

The farmers object to this, they want to have it always at a fixed degree and price, as then they understand exactly what they are getting. The society to suit them in this would have to test and mix the manures; but they cannot and will not do so, having as much work on their hands as they can possibly attend to, and they have been obliged to address themselves to French makers, who give them exactly what they want.

English manures should not be manipulated in this country.

I may also add, that it is a most undesirable thing that importers of English manures should have to manipulate them so as to meet the needs of the farmers, they should always be able to be sold exactly as they come from the wholesale houses, because altering their proportions gives an opportunity for adulteration,

English article, however good it may have been when it first reached the farmers in an adulterated condition, it has a bad name in consequence.

It could be so sent that it can be sold to the farmers exactly in the same state as it is imported. The society will not sell it in any other way, and they are perfectly right, as they thus avoid responsibility, and leave it to rest on the proper party, the manufacturer.

As to the failure of the English to give satisfaction for the article I have mentioned, and also to some extent because it is something dearer than French, some large manufactories have been got up in France latterly; but I hear that no more will be made than the English, and a good business can be done if English firms are prepared to sell at the following prices.

Super-phosphates, soluble in citrate, 44 c. per degree; What is required, and the price.

Agricultural societies to which I have referred, and the new co-operative society, which buys wholesale, offer great advantages to persons wishing to do business in the country. The new Co-operative Society of the Charente Inférieure.

After, especially, is very well-managed by a gentleman who has been much in England and seen the benefits resulting from it, is anxious to extend these advantages to his own country, and has all his time to it; and, although it only began working with a small capital, has already sold to the amount of 10,000l. It helps farmers not only by buying for them the things and other necessities, but in many different ways. For instance, if they want to realise the value of their crops it buys them from them on the ground, reaping and storing them, and re-selling as opportunity offers; and as this branch of business extends the society is anxious to export, so as to reach the best markets.

Now buying all kinds of produce, corn, hay, fruit, butter, eggs, and even oysters, that it can re-sell, it is very glad to find purchasers in England, so that anyone who wishes to do this kind of business cannot do better than put himself into communication with the "Directeur de la Société de Consommation de la Charente Inférieure," at La Rochelle, writing of course in French, but it would be much less like to come over than to write.

I should also suggest to any makers of agricultural, or any other kind of machines, implements, &c., who think they can suit the requirements of this district, to consign their goods to the society for trial and sale. In doing so they will have the advantage of dealing with persons who only look to the interests of the public of this country, and not to making profits; and, therefore, although as good Frenchmen they prefer to sell their national manufactures, they will recommend their clients whatever is best value for their money, native or foreign, and give a fair field and no favour.

Consigning
articles to the
society for
sale as agents.

In consigning goods for sale they will also be meeting what is one of the great difficulties these societies have to contend with, that the French law limits their capital to a very small sum (8,000*l.*); and they cannot, therefore, do anything like the amount of business they wish, but as agents there could be no better ones.

I have already shown the advantage of doing this by the instance of the American binders, which sold simply because they had been consigned, and this appears to me to be the very opportunity desired by certain manufacturers, when they suggested that museums of samples should be attached to Consulates, with the difference that this is a much more practical and better plan.

Probable ex-
emption of
articles neces-
sary to farmers
from an in-
crease of duty.

A further reason why it is well worth taking trouble to secure the coming trade in all matters necessary to farmers, is that once obtained it is less likely to be obstructed by protective duties than any other in the future.

As I have already shown, the agricultural interest is far the most powerful in France, and is that which suffers most from bad times and over-taxation, and will insist on a large amount of protection if it cannot be helped in some other way.

The great object of any Government, and of all persons having the interests of the country at heart, must be to get them to moderate their demands for protection as much as possible, and the only way in which this can be done is by proving to them that they will gain more by some other plan.

This is what the societies are doing when they supply them with the means of doubling their returns, and reducing their expenses to one half by better farming and the use of improved implements, and this year the co-operative society has made great progress in this direction.

The farmers have hitherto been spending 60 fr. per hectare (2½ acres) in getting in the harvest.

The agents of the society have gone down to them, and said, "Let us do it for you, and we will charge you 15 fr.;" and they have done it, besides making a fair profit, and doing in one day what took ten formerly.

But all this depends on their being able to work with the best apparatus bought at the cheapest rates, and it is unlikely that any Government would venture to increase the duties on the very articles without which it cannot be done, with the alternative before them of an increased duty on food products. I think, therefore, that while we may be pretty certain of a considerable increase in protective duties generally after 1892, it is very likely they will not extend to articles useful to agriculture, and that if any change is made it may be the other way.

I have now given as briefly as I can the suggestions and particulars which I consider important to make known as early as possible, and while there is plenty of time to prepare for the trade of next spring and summer, and will only add further that the harvest has been about an average one for grain crops in quantity and quality.

Hay is very plentiful and cheap, but a good deal of it badly stored owing to wet weather in June. Results of the harvest, and of stock farming for 1889.

There is a considerable rise in the price of live stock, but still profits where there are any are very small, and the farmers miserably off, and over head and ears in debt.

Having no security to offer they are charged heavy interest (as much as 9 or 10 per cent., I am told, in some cases), and one of the plans for helping them, which the co-operative society has in view, is the establishment of a land bank to lend them money at moderate rates; but this is a subject which offers great difficulties, from the absence of any security for advances, especially in the case of the tenants, whose whole farming stock and implements are subject to a first charge for the landlord's rent.

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FRANCE.

REPORT FOR THE YEAR 1888
ON THE
AGRICULTURE OF NICE.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 448.

*Issued during the Recess and Presented to both Houses of Parliament
by Command of Her Majesty.*

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FRANCE.

NICE.

Consul Harris to the Marquis of Salisbury.

My Lord,

Nice, October 7, 1889.

I HAVE the honour to enclose my Agricultural Report for the year 1888.

I have confined myself, as in my previous report on this subject, to the examination of the state of the agricultural population of my district, which I initiated last year. I then referred to an official inquiry which was being commenced for the section of Social Economy at the Paris Exhibition. I have since, through the kindness of Mr. Henry, the *Prefêt* of this Department, been enabled to peruse the answers from all the communes which had responded to the Government call, and Mr. F. Brun, one of the three commissioners to whom the inquiry was confided, most kindly volunteered his assistance in the examination of them.

I have, &c.

(Signed) J. C. HARRIS.

Agricultural Report for the Year 1888.

In my agricultural report for the year 1887 (No. 448), I contrasted the prosperity of the peasant proprietors of Mentone with the comparative poverty of the same class in the commune of Villeneuve Loubet, and I was led to infer the almost universal poverty of the small proprietor throughout France by the perusal of Lady Verney's able book on the subject, in which a truly lamentable picture is drawn of the results of that system. Having, however, spent a few days this summer at the *château* of a friend near Pontoise, at some 35 kiloms. from Paris, I have found the peasant proprietors of Conflans, Eragny-Neuville, Jouy-le-Moutiers, and, in general, of the valley of the Oise from Pontoise to its junction with the Seine, presenting quite as brilliant an example of prosperity as those of Mentone; and yet the land I found to be extremely subdivided, reminding me of our English allotments, the small patches ranging from one-quarter to one-half an hectare,

(766)

A 2

several small detached parcels belonging, however, in general to the same owner.

Examination
for purposes
of comparison
of a portion of
the valley of
the Oise.

It struck me very forcibly that it might be useful to give a few details of this further example of prosperity among peasant proprietors, although not belonging to my district, for purposes of comparison with the condition of the "petite culture" in the Maritime Alps, and I, therefore, proceeded to collect the following items of information:—

The subdivision in the district is so great that my informant, who has but a small place on the banks of the Oise, containing some 105 hectares of land outside a small park, is looked upon in the neighbourhood as a very great landowner indeed; the next largest proprietor having only 5 to 6 hectares, while the system of "morcellement" is so rooted in the habits of the district that his own farm is subdivided into little patches for letting, in the very same manner as the land of the peasant proprietors.

This valley and the surrounding hills are largely cultivated for fruit and vegetables for the Paris market. Fruit trees in large numbers are visible all over the country—a patch of fruit next to a patch of corn or vegetables. Often (the fruit culture being so valuable) several contiguous owners grow fruit side by side, the aspect of the spot being in this case that of a small orchard. Asparagus is grown under the fruit trees, as well as in patches, consisting exclusively of this plant; the same may be said of French beans.

The value of the fruit crop for the Paris market has somewhat diminished of late, owing to southern competition; but many of the small owners realised fortunes during the second Empire, when this competition did not yet exist, owing to the incomplete state of the southern railways. They are, however, even now constructing dwellings with considerable pretensions to comfort, and even to external appearance. They have mostly other investments, besides those in land, and are all, or nearly all, able to keep a horse and cart.

So rich are these fruit and vegetable patches that my friend, having purchased a small parcel stocked with fruit trees for the sum of 500 fr. (20*l.*), some years since made 140 fr. (5*l.* 12*s.*) from the fruit it bore him in the very first year after his purchase. The crop is, however, far from being so abundant every year, and most years it would not average more than half the above figure in value.

Price of land
same as on the
coast of Alpes
Maritimes.

The price of land in the district is from 7,000 fr. to 8,000 fr. per hectare, which, as we shall presently see, is nearly the same as in the coast region of my own district. At Conflans, which overlooks the Seine, though not above a couple of kilometres removed from the valley of the Oise, the fruit is grown against walls of considerable extent, built expressly for the purpose, and at just sufficient distances from each other to ensure the fruit getting the full benefit of the sun. They each have a considerably overlapping coping, which must necessarily be of great use in protecting the trees in case of hail or frost.

Returning now to my own district, I have first to note that it was subdivided into three zones for the purposes of the Government inquiry into the social condition of the population, to which I have already referred in my previous report. These are the region of the littoral or coast region, the region of the olive tree, and the alpine region.

It should, however, be noted at starting that the olive tree flourishes in the coast region, and even down to the sea shore, just as well as higher up the hills, and that the division line, adapted between the two regions, although convenient for the purposes of the inquiry, does not correspond with any natural dividing line whatever.

The answers to the first question concerning agriculture in the "questionnaire" of the inquiry are of great interest, inasmuch as they establish the proportion of peasant proprietors throughout the three zones of the district. We find this percentage to be 67·66 per cent. for the communes of the littoral or coast region, 75·23 per cent. for the hill communes, and 85·65 per cent. for the mountain or alpine communes. If, moreover, we take them commune by commune, we find that in the coast region there is no single commune consisting exclusively of peasant proprietors, the one having the highest proportion being that of La Turbie, above Monaco, where the percentage is 90; the next being Roquebrune, 85 per cent.; and Mentone, 83½ per cent. In the hill region we have two communes—that of Lieuche and that of Castellar, above Mentone—having none but peasant proprietors, or 100 per cent., while that of Berre has 98 per cent.; Cuebris, 95 per cent.; and La Gaude, Bonson, Guillaumes, and Tourette-Levens, each 90 per cent. If, finally, we turn to the alpine region, we find 13 communes entirely cultivated by peasant owners: they are Courmes, Coursegoules, Ilonso, Isola, Moulinet, Pierlas, Roure, Salagriffon, Valdeblorre, Les Ferres, Gars, Venanson, and Rimplas, while the percentage is above 90 for no less than 23 more.

It will thus be seen that, as we rise from the sea to the alpine region, the proportion of peasant owners constantly increases, and it culminates around the higher mountains in a considerable number of communes, where the peasants own the whole of the land.

This state of things is not to be wondered at, when it is considered that almost all the well-to-do classes gravitate to the towns along the coast, and include the native tradesmen. These, almost without exception, as I pointed out in my last report, become owners of land in their own vicinity. They always employ "métayers" to cultivate their farms, and they thus tend to reduce the number of the other great class of cultivators in their neighbourhood.

It is, I apprehend, for this reason that we find the proportion of "métayers" diminishing as we ascend towards the mountains, while that of the peasant owners increases; the "métayers" being 18½ per cent. in the coast region, 15½ in the hill region, and only 7½ in the mountain region.

Extent of land capable of supporting a family.	The small residuum not accounted for by the two classes of cultivators above mentioned pay rent for their farms. Turning now to another part of the subject, we find that the extent of land capable of supporting a family of from four to five persons is reckoned at 2 hectares and 84 centiares, or nearly 3 hectares (equal to $5\frac{1}{2}$ to 6 acres) in the coast region, excepting, however, where flower crops or early vegetables can be grown exclusively, when a single hectare, or even less, is reckoned as sufficient. In the hill region this extent is set down at 5 hectares and 62 centiares, while in the mountain region it is $8\frac{1}{2}$ hectares.
Dispersion and subdivision.	In the whole of the Maritime Alps the parcels of land are much dispersed, necessitating loss of time to the peasant owner in going from the one to the other, and rendering the employment of machines almost impossible. This extreme subdivision is stated not to be of so much consequence where flowers or early vegetables are concerned, while from the hill region comes the remark that the subdivision of the land into those small parcels thus dispersed, often enables the owner of several of them to grow a greater variety of crops, some of the patches being more sheltered or better exposed than others.
Subdivision not greatly increased.	I gather from the inquiry that nothing has ever been done in my district with a view to remedying the evils of subdivision, which, however, are generally recognised as an inconvenience; nor are there any societies, save in one commune, for the purpose of providing any kind of agricultural machines for general use. What is especially worthy of note is that the "morcellement" has not so greatly increased since the beginning of the century as might be supposed by reason of the French law of inheritance, the figures showing that in the hill and mountain regions the subdivision has only increased in that long period of time in one-half of the communes composing them. Although the inquiry gives no reasons for this, I am satisfied that the small number of children and the thrift universally observable, which were the reasons given for the same fact at Mentone in my previous report, are mainly responsible for it.
Value of land.	The whole of the land is found to have changed hands from three to four times since the beginning of the century, some 70 per cent. of these changes being due to death, 25 per cent. to voluntary sales, and the remaining 5 per cent. to sales by order of the courts: this last percentage is slightly higher for the coast region, the figures being $61\frac{1}{2}$ per cent. due to deaths, 32 per cent. to voluntary sales, and $6\frac{1}{2}$ per cent. to sales by authority of justice. I can find no questions or answers in the inquiry as to the proportion of mortgages on the land, nor as to litigation, of which the inhabitants of my district are said to be very fond. An interesting portion of the inquiry relates to the present value of land as compared with the same at the commencement of the century. The letting value, as given for the coast region, is as follows:— In 1800, 99 fr. per hectare; in 1887, 311 fr.: the value for

purchase being 3,918 fr. per hectare in 1800, and 8,585 fr. in 1887. The latter is but little higher than the price in the valley of the Oise, as above mentioned.

In the hill region the letting value was 57 fr. 25 c. per hectare in 1800, and 76 fr. in 1887; while the selling value was 2,584 fr. in 1800, and 3,729 fr. in 1887.

In the mountain region the figures given are:—Letting value in 1800, 86 fr. per hectare, and in 1887 110 fr., while the selling value was, in 1800, 1,694 fr., and in 1887 2,051 fr. These figures show that the selling value has more than doubled in the coast region, that it has increased by one-third in the hill region, and by about one-fifth in the mountain region. It should, however, be noted that whereas the selling value has doubled on the coast during the century, it has increased fourfold at Cannes, Mentone, Nice, and other favourite resorts along the coast; the figures given for agricultural land only being 14,500 fr. for Cannes and 15,500 fr. for Mentone, and although no figures are given for the commune of Nice, which does not appear to have answered any of the questions, the figures above quoted have been fully realised there, and have more than once been considerably surpassed.*

The answers to the inquiry would seem to show that the influence of the "petite culture" is a very good one on the intelligence and activity of the cultivator; and his condition is stated to be fairly satisfactory even in the mountain region, where the proportion of the fairly prosperous is set down at 65 per cent., while, with regard to conduct and sobriety, it is placed as high as 88 and 89 per cent. respectively; and I can testify that the latter quality is shared by all the agricultural classes throughout my district. In the mountain region the dwellings are divided in equal proportions among the fairly good and the bad. Clothing, however, would appear to be good in only 25 per cent. of the mountain population, while food is given as good in 71 per cent. of the same, which I am inclined to think is much too high a figure. Although no figures are given for the middle region in this respect, it is claimed that the "petite culture" has there an equally good influence on the capacity and activity of the cultivator, that there is sensible progress in the majority of the communes, and that there are improved methods in a quarter of the number. Very much the same account is given of the coast region, where, however, it is to be noted that a considerable improvement is observable in the matter of dwellings, dress, and comfort generally as compared with the mountain region, in many parts of which there appears to me to prevail a low condition of physical health, and a very general tendency to "goître," the latter probably caused, as it is said to be in Switzerland, by the snow water. There is moreover a considerable difference in the stature of the peasants of the two regions, which is greatly in favour of the inhabitants of the coast. Some years since I accompanied the then Prefect,

Influence of
"petite cul-
ture" on intel-
ligence of the
peasantry.

Low condition
of physical
health in
mountain
regions.

* These figures may be increased tenfold and twentyfold in the case of eligible building sites.

Effect of the
conscription
on the
peasantry.

Defects of the
inquiry.

the Marquis de Villeneuve Bargemon, and the General of Division, on their "Tour de Révision," or examination of the conscripts having come of age for service, and I was much struck with the low physical condition of many of them, and with the number of the deformed or ill-formed who had to be struck out of the list to their own evident delight. Indeed, the conscription cannot be said to be loved either in town or country, and many expedients are resorted to to avoid serving in the army. This is hardly to be wondered at, especially nowadays, where it may involve service for three years in Tonquin or Cochin China, or some other unhealthy colony, which, to a home-loving Frenchman, is like a sentence of transportation for the same amount of time. The conscription falls especially hard on the "métayer," who, having almost always far more land to cultivate than the peasant owner, requires far more than the latter the help of his son or sons. Moreover, the soldier often neither returns at all, or in broken health, or has acquired vicious habits, which are by no means compensated for by the discipline he has acquired at the same time. It would be unfair not to acknowledge, however, that when he escapes these dangers he is a better man for his soldiering. The low condition of the mountain population, which I cannot but think must be attributed to inferior food, lodging, and dress, in spite of the favourable answers returned from that region, is not in any way alluded to in the inquiry, and rests solely on my own observation, which, however, I cannot think mistaken. And here I would point out that, in some respects, an inquiry conducted exclusively by question and answer must be unsatisfactory, inasmuch as the answers are often given by fairly intelligent persons, but who have no opportunity whatever afforded them of comparison; hence their estimate of the condition of the peasantry will be coloured by their familiarity with it from their youth. Often untravelled and often prejudiced, they will as often be quite incapable of realising the defects to which they have been long accustomed. Sometimes they even go further, and contradict in one answer what they have said in another. Sometimes they are stupid, and their sole aim appears to be to avoid giving definite answers, while the too often recurring comparison between the commencement of the century and the present time, however valuable in some cases, when figures are given, nevertheless embraces too long a period to furnish useful data in many others, while it presupposes a knowledge of anterior local facts, an acquaintance with which is almost out of the reach of the persons to whom the questions are addressed; hence the answers are often vague and unsatisfactory. Moreover, the writers of the answers, while exhibiting a certain vague preference for peasant proprietorship, do not seem to found it on any definite advantages; they do not show, for instance, that the "métayer" is less well to do than the peasant owner in any one particular, and while stating that peasant ownership is favourable to the development of activity and intelligence, they use almost identical terms in speaking of the "métayer," and even of the agricultural labourer. For my part I cannot but think that, in respect of the first of

these two qualities, the *Instituteur* of Villeneuve Loubet, quoted in my last report, was right when he tersely said of the peasant in general, "*Son énergie est grande quant il travaille pour son compte, faible pour autrui.*" Nor do I see any reason for altering my estimate of the condition of the "*métayer*" as given in that report, when writing of the district around Nice, and neither do I find anything in the Government inquiry in any way contradictory of that estimate.

Although a small percentage of farms are, according to the inquiry, let at a fixed rental, no account is therein given of the condition of this description of farmers, nor have any of them fallen under my own observation. It is different with regard to the agricultural labourer, whose condition is carefully inquired into. His wages are set down at 3 fr. per diem without food, or 2 fr. 8 c. with food, which is only 2*d.* less than the figure given for Mentone in my last report. Women get 1 fr. 88 c., and children 1 fr. 13 c., without food, and 1 fr. 10 c. and 81 c. respectively, with food; these wages are stated to have doubled since the beginning of the century. 20 per cent. of the labourers are stated to be wholly illiterate; but instruction being now obligatory this proportion is gradually diminishing for these and other classes of cultivators. 75 per cent. of the agricultural labourers are given as saving up something, and, of the amount saved, it is stated that 80 per cent. goes in the purchase of land, and only 20 per cent. is entrusted to the savings banks. As, however, it would be out of the question for them to save sufficient in less than 10 years to purchase any appreciable quantity of land, this account leaves one in doubt as to what is done with the savings while they are growing into a sufficient amount, and it suggests the old stocking of former days as the temporary recipient. The figures given I understand to be applicable not only to the agricultural labourer, but to the other classes of cultivators as well; but I would remark that, while the "*métayer*" has generally too much land to enable him to adopt another trade in addition, either in his own person or in that of his sons, the present proprietor nearly always has a trade to fall back upon, in addition to the cultivation of his small parcels of land. While some of the family till the land, other members are shoemakers, tailors, masons, carpenters, or blacksmiths. These avocations are stated in very many instances as doubling the family resources; and when we come to the examination of what is denominated, in the inquiry, the budget of an agricultural family, we at once perceive that we have here the clue to the prosperity claimed for the peasant proprietor of my district; the total sum of his receipts being set down at from 2,500 fr. (100*l.*) to 2,800 fr. (112*l.*), of which all but 400 or 450 fr. are due to wages earned by the family during the year, the 450 fr. representing the produce of the farm and certain miscellaneous receipts. If, therefore, the resources of an "agricultural" family in the Alps Maritimes were derived for only one-sixth from agriculture, as is stated in this part of the inquiry,

Condition of
the agricul-
tural labourer
and his wages.

Peasant
proprietorship
nearly always
joined to some
trade.

the peasant proprietor would be transformed into a carpenter or a blacksmith, possessed of one or more small patches of land; but I apprehend that the proportion here given between the peasant's income from land and that from other sources is erroneous, for it does not tally with the answers given to a previous question where various trades and wages are set down as being accountable in the coast region for 41 per cent. of the peasant's resources, while in the middle region they are reported as being nearly doubled by the same means. Even this proportion would seem to me to be far too high in the case of the "métayer" who, as above stated, has too much land to cultivate to adopt a trade in addition, and who can only hire himself out occasionally as a day labourer in the intervals of work on his farm. There is undoubtedly, however, a temptation that way of late years, arising from the increase in wages, and from the small yield of the olive and wine crops, and he occasionally neglects his farm to go and earn 3 fr. a day as a labourer, when the farm would need his services; but this can only happen in neighbourhoods where much work is going on at the time, and the importation of Piedmontese from over the frontier prevents wages from rising above that figure, the supply of labour being fully equal to the demand.

I have now exhausted the chief points of interest contained in the Government inquiry; but I may add that there is practically no emigration from my district.

Types of
peasant
families in the
mountain
region.

As I gave one or two types of peasant families in my last report, taken from Villeneuve Loubet, on the coast region, I will give one in conclusion from La Peune, one of the mountain communes. It is, like the former ones, taken from life:—Father, aged 60; mother, 50; daughter, 11; uncle, 70; and two servants, 40 and 10 respectively. Trades, sowing and shoe-making. The father and mother keep the shop, the rest work on the farm; they have land worth 6,000 fr.; their dwelling and furniture are rather poor, their food is fair but coarse, their clothing sufficient and fairly good, which is probably owing to there being sempstresses in the family. Their expenditure appears to be, during the year—butter's meat, 50 fr.; vegetables, 90 fr.; bread, 350 fr.; milk, butter, oil, 80 fr.; miscellaneous, 30 fr.; wine, 57 fr. (?); rent, 50 fr.; furniture (wear and tear), 20 fr.; firing and lighting 20 fr. (?); taxes, 17 fr.; clothing, 200 fr.; extras, 80 fr. This gives a total expenditure of only 1,044 fr. a year. As, however, the income of an average family from the same place is given as amounting to 2,790 fr. from all sources, I can hardly believe that thrift would go so far as to save considerably more than half that income. Moreover, the expenditure for the items of wine, rent, firing, and lighting appears to me far too small to be correct. None of the peasants, however sober, are accustomed to stint themselves in the matter of wine, and this cannot possibly be put down at less than 30 c. (3d.) the litre, nor can a working man drink less than a litre per day of it, which would give 108 fr. for a single person by the year; and supposing only two members of the typical family to drink this

amount, and the rest to divide 1 litre between them, this would give 324 fr., instead of 57 fr. I should be inclined to place the expenditure of such a family, and that by the exercise among them of the very greatest economy, at 2,000 fr. at the least, which would still leave 790 fr. of savings at the end of the year; and I am the more inclined to that figure as the lowest one which they could live, by the fact that the wages of the two servants have been omitted from the calculation in the inquiry, while this item alone cannot but add several hundred francs to the sum total of the family expenditure.

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FRANCE.

PARIS.

The Earl of Lytton to the Marquis of Salisbury.

My Lord, Paris, October 15, 1889.
 I HAVE the honour to transmit herewith to your Lordship a Report by Mr. Crowe on the state of French Trade, and chiefly of the Export Trade, for the last 12 years.
I have, &c.
(Signed) LYTTON.

Mr. Crowe to the Earl of Lytton.

My Lord, Paris, October 14, 1889.
 As the time approaches when France must decide whether she intends to renew or abolish commercial treaties, statistics of trade, recently published, are scanned with increasing interest by business men, and attention has been called to a serious contraction now observable in the export business of the country. The returns which the French Government have lately been publishing include the imports and exports of the last 12 years, beginning with 1877 and ending with 1888. They show conclusively enough that France has partially recovered from the depression of 1887, but that her present exchanges are still in many respects behind those of 1884.
 A few general figures will make this clear, showing, as they do, the weight and value of the whole trade of France for the period I have described:—

Years.				Imports and Exports.	Value.
				Tons.	Million Francs.
1877	..	..	..	20,000,000	7,106
1884	..	..	..	27,500,000	7,500
1886	..	..	..	25,000,000	7,400
1888	..	..	..	26,900,000	7,300

These figures, distributed into imports and exports, give the following results:—

Years.				Imports.	Value.
				Tons.	Million Francs.
1877	..	..	..	15,000,000	3,669·8
1884	..	..	..	22,800,000	4,343·5
1886	..	..	..	20,258,000	4,208·1
1888	..	..	..	21,500,000	4,100·0

Years.				Exports.	Value.
				Tons.	Million Francs.
1877	..	..	..	4,918,470	3,436·3
1884	..	..	..	4,753,654	3,232·5
1886	..	..	..	4,788,106	3,248·8
1888	..	..	..	5,395,859	3,246·7

The weight of imports began to shrink in 1885, continued to shrink till 1886, and only partially recovered in 1888. The value diminished between 1884 and 1888 in regular progression.

The shrinking of the weights of exports in the 10 years 1877 and 1886 was very marked. A slight recovery occurred in 1888, but the values, which declined after 1877, never afterwards attained the level of that year.

Under a closer examination the details of imports and exports display a number of weak places in French business.

Manufactured articles of some specific kinds appear to have had a better market for import than others during the 12 years. But the advance is confined to a few items, such as silks, paper ware, tools and metal goods, leather ware, clock ware, and wine.

Were it not for the imports of wine, which have increased in 12 years from 29,000,000 fr. in 1877 to 517,000,000 fr. and 437,000,000 fr. in 1887 and 1888 (1,160,000*l.* to 20,680,000*l.* and 17,480,000*l.*), the current of trade into France would appear greatly reduced. Cottons have fallen from 66,000,000 fr. to 41,000,000 fr. (2,640,000*l.* to 1,640,000*l.*); woollens from 68,000,000 fr. to 65,000,000 fr. (2,720,000*l.* to 2,600,000*l.*); straw ware from 37,000,000 fr. to 17,000,000 fr. (1,480,000*l.* to 680,000*l.*); cotton yarns from 43,100,000 fr. to 26,000,000 fr. (1,720,000*l.* to 1,040,000*l.*); woollen yarns from 16,000,000 fr. to 14,000,000 fr. (640,000*l.* to 560,000*l.*); linen yarns from 10,000,000 fr. to 8,000,000 fr. (400,000*l.* to 320,000*l.*); and linens from 10,000,000 fr. to 5,000,000 fr. (400,000*l.* to 200,000*l.*).

What interests Frenchmen most, at the present time, is the export market, and I propose to examine this market for the purpose of showing that French merchants may have good grounds for being alarmed at the state in which they find it.

Amongst the articles of export, which the French dispose of advantageously, cotton stuffs are conspicuous. The value of the

exports of these stuffs was 62,000,000 fr. (2,480,000*l.*) in 1877, 407,000,000 fr. (4,280,000*l.*) in 1886, and 104,000,000 fr. (1,160,000*l.*) in 1888. There was a decrease in business since 1888, but not a very serious one.

France cannot, of course, compare with Great Britain in the export of cottons. Her business is but a tenth of ours, but her manufacturers justly attach importance to the possible extension of their trade. Progress, again, may be noted in the exports of all sorts of French yarns, machinery, and furniture. But here the brightness of the picture fades. We turn to other more important French staples, and discover the true source of French anxieties.

The export of French woollens was valued at 401,000,000 fr. (16,040,000*l.*) in 1882. It fell to 375,000,000 fr. (15,000,000*l.*) in 1886, and scarcely exceeded 323,000,000 fr. (12,920,000*l.*) in 1888.

The exports of silks fell from 259,000,000 fr. (10,360,000*l.*) in 1887 to 223,000,000 fr. (8,920,000*l.*) in 1888. Linens, which had an export value of 31,000,000 fr. (1,240,000*l.*) in 1877, hardly gave 8,000,000 fr. (3,200,000*l.*) in 1888.

Paris is also a sufferer in regard to its pet trades. Cabinet-makers and turners and toy manufacturers used to have a very profitable business worth 183,000,000 fr. (7,320,000*l.*) in 1877. Its value was but 128,000,000 fr. (5,120,000*l.*) in 1888. So again with—

	1887.	1888.
	Million Francs.	Million Francs.
Leatherware exports	151·3	135·3
Refined sugar	131·4	43·5
Artificial flowers and articles of fashion	36·6	28·9
Hats, silk and felt	12·1	6·1
Gold and silver ware	64·3	53·5

The countries to which France exports her goods may be divided into States: where the exports have remained stationary, where increased business has been done, and where a decline is apparent.

There are but three or four States in which no material change has occurred. These are Portugal (to which France has been sending nearly 1,000,000*l.* sterling of goods yearly for a considerable time); China (which regularly takes for a value of 120,000*l.*); British America, 240,000*l.*; and Austria, 800,000*l.*

The countries with which France has increased her export business are as follows:—

Country.	1877.	1886.	1888.	Increase.
	Million Francs.	Million Francs.	Million Francs.	Million Francs.
Belgium	446	448	472	26
United States	216·6	282·2	255·7	39
Spain	132	173	172	40
Argentine Republic	75	110	134	59
Turkey	36	46	47	11
Uruguay	20	20	24	4
Mexico	18	20	27·5	9
New Granada	17·7	26	40	23
Tripoli, Tunis, and Morocco	11	24	20	9
British India	8·4	8·7	12	4
Australia	1·4	6·5	6	5
Total increase ..	..	..	..	229

But the countries in which French trade has decreased are more numerous than those in which the balance is on the other side.

The following table will show some of the principal figures:—

EXPORTS from France in Millions of Francs.

Country.	1877.	1886.	1888.	Decrease.
	Million Francs.	Million Francs.	Million Francs.	Million Francs.
Russia	15·9	10·8	10	6
England	1,059	855	863·1	196
Germany	395	297	308	87
Switzerland	237	209	209	28
Italy	185	192	119	66
Brazils	77	57	64	13
Sweden	11	7	7	4
Norway	12	5	4	8
Holland	35	30	30	5
Egypt	25	24	18	7
Chili	23	14	14	9
Peru	19	6	5	14
Hayti	12	5	7	5
St. Thomas	11	6	8	3
Spanish American possessions	15	7	8	7
Greece	15	21	10	5
Venezuela	8	3	3	5
Total decrease ..	..	..	..	468

Great Britain, it will be observed, took more than 42,000,000*l.* sterling worth of French goods in 1877. She was content with 34,500,000*l.* worth in 1888.

Germany reduced her orders for French goods in the same interval from 15,000,000*l.* to 12,000,000*l.* sterling; Switzerland, which bought for 9,000,000*l.* sterling in 1877, came down to 8,000,000*l.* sterling in 1886, and shows no sign of requiring more.

Italy has brought down her wants from 7,400,000*l.* to 4,760,000*l.*, Brazil from 3,000,000*l.* to 2,500,000*l.*, Holland from 1,400,000*l.* to 1,200,000*l.*, and Russia and Greece from 640,000*l.* to 400,000*l.* The decrease in French exports shown in the last table is 468,000,000 fr. (18,720,000*l.*). This decrease is half balanced by the improvement shown in the table immediately preceding, which amounts to 229,000,000 fr. (9,160,000*l.*), leaving a loss on French principal exports in 12 years about 9,560,000*l.* a year.

The question which French economists have now to consider is whether, in remodelling their tariff and commercial policy, the French Government can find means to extend the export market. Many persons at the present moment think this can only be done by a renewal of commercial treaties.

I have omitted from the tables above given all reference to the trade of France with her colonies. I propose to quote, as shortly as possible, some figures for the purpose of showing the effect of the policy which France has lately been pursuing towards her colonial possessions.

A short table, which I append, gives the value of the whole trade of France with her colonies in millions of francs during 1887-88. It displays a decided improvement for 1888 over 1887.

TRADE of France with her Colonies, Imports and Exports combined, in Millions of Francs.

Country.	1888.	1887.	1884.	1877.
	Million Francs.	Million Francs.	Million Francs.	Million Francs.
Algeria	331·7	287·0	248	260
St. Pierre et Miquelon	36·1	33·5	34	33
Guadeloupe	35·6	31·0	27	32
Senegal and Gulf of Guinea ..	35	27·5	27	16
Martinique	34·4	35·9	30	34
Réunion	22·6	18·6	17	30
French India	15	19·3	17	2·5
French Indo-China	14·6	12·7	17	6·5
Pacific Islands	6·1	4·9	0·6	8·0
French Guyana	5·9	5	5·9	5·7
Mayotte, &c.	1·4	1·3	1·3	3·4

The imports and exports taken separately for 1888 and 1887 are stated in millions of francs as follows:—

Country.	Exports.		Imports.	
	1888.	1887.	1888.	1887.
	Million Francs.	Million Francs.	Million Francs.	Million Francs.
Algeria	158·1	133·9	173·6	153·1
St. Pierre et Miquelon	32	29·2	4·1	4·3
Guadeloupe	23·2	21·2	12·4	9·8
Senegal and Guinea coast	24·9	18·9	10·1	8·6
Martinique	23·0	21·7	11·4	14·2
Réunion	15·9	13·7	6·7	4·9
French India	14·7	19	0·3	0·3
French Indo-China	2·9	2·7	11·7	10·0
Pacific Islands	2·1	0·3	4·0	4·6
French Guyana	0·2	0·7	5·7	4·3
Mayotte, &c.	1·1	1·1	0·3	0·2
Total	298·1	262·4	240·3	241·3

The trade of France with Algeria expanded slowly. Import and export combined were worth 264,000,000 fr. in 1877; being 290,000,000 fr. at the close of 1880, they fell to 250,000,000 fr. in 1884, and have since advanced to 287,000,000 fr. in 1887, and 331,000,000 fr. in 1888.

Taking imports alone, we find that between 1877 and 1880 the value of the goods entering Algeria from France rose from 122,000,000 fr. to 127,000,000 fr., that it then fell to 92,000,000 fr., and only began to recover in 1885-6. During 1886 the imports were valued at 124,000,000 fr.; they improved to 134,000,000 fr. in 1887, and 158,000,000 fr. in 1888. The increase is due to the enlarged demand in France for Algerian wine, corn, cattle, and wool, which, taken together, give a plus of 41,000,000 fr. for 1888 over 1887.

The exports were over 138,000,000 fr. in 1877. They rose to 165,000,000 fr. in 1882, and 189,000,000 fr. in 1886. They were 153,000,000 fr. in 1887, and 173,000,000 fr. in 1888. The average of 155,000,000 fr. of exports for the 10 years 1877-1886, is not thought satisfactory by French economists, nor is it considered that the progress made is proportionate to the increase in the welfare and population of a colony, which has almost come to enjoy all the privileges of the tariff of the mother country.

Senegal and the French settlements in the Gulf of Guinea, sent 28,000,000 fr. (1,120,000*l.*) worth of goods to France in 1885, as against 11,000,000 fr. (440,000*l.*) in 1877.

But we must remember that France greatly enlarged her territories in those parts between these two dates. In 1887 the import of Senegal and French West African produce into France had fallen to 19,000,000 fr. (760,000*l.*), and in 1888 only showed a recovery to 25,000,000 fr. (1,000,000*l.*), chiefly due to an exceptionally good crop of nuts and gums.

In exchange for the goods which France thus takes she only sends wine and a few other articles to Senegal and the Guinea

coast, making up a total which gradually increased from 5,000,000 fr. to 8,000,000 fr. (200,000*l.* to 320,000*l.*) between 1877 and 1886, and only reached 10,000,000 fr. (400,000*l.*) in 1888. Yet this is prosperity compared with the situation of French business in Mayotte, Nossi Bé, and St. Mary of Madagascar. In these settlements French trade gradually declined from 3,250,000 fr. to 1,330,000 fr. The imports to France were 3,000,000 fr. in 1877, 4,000,000 fr. in 1882. They have been stationary at 1,000,000 fr. since 1886. The exports from France had risen from 300,000 fr. in 1877 to 500,000 fr. in 1880. They fell as low as 285,000 fr. in 1888. For Réunion statistics show:—

IMPORTS TO FRANCE.						Francs.
1877	..	..	..	..	..	22,000,000
1886	..	..	..	..	..	14,500,000
1888	..	..	..	..	..	16,000,000

EXPORTS FROM FRANCE.						Francs.
1877	..	..	..	..	..	8,000,000
1886	..	..	..	..	..	6,000,000
1888	..	..	..	..	..	6,500,000

Yet in Réunion, as well as in the smaller French East African settlements, French goods have been free from the burden of a customs tariff since 1885, and foreign goods have since paid differential duties. Bounties have been secured to French colonial sugar and rum, and additional advantages have been given to these products by excluding similar articles of foreign origin from the colonial market. The policy of bounties, exclusion and differential treatment, has also been steadily applied in Guadeloupe and Martinique. At one time, within the last 12 years (*i.e.*, in 1882), the trade of France with Guadeloupe was 40,000,000 fr. (1,600,000*l.*). Statistics now show:—

IMPORTS TO FRANCE.						Francs.
1877	..	..	..	..	..	20,000,000
1886	..	..	..	..	..	16,000,000
1888	..	..	..	..	..	28,000,000

EXPORTS FROM FRANCE.						Francs.
1877	..	..	..	..	..	11,000,000
1886	..	..	..	..	..	9,000,000
1888	..	..	..	..	..	12,000,000

In Martinique worse results appear:—

IMPORTS TO FRANCE.						Francs.
1877	..	..	..	..	..	20,000,000
1886	..	..	..	..	..	18,000,000
1888	..	..	..	..	..	10,500,000

EXPORTS FROM FRANCE.

						Francs.
1877	..	..	..	..	..	14,000,000
1886	..	..	..	..	..	10,000,000
1888	..	..	..	..	..	11,000,000

In exchange for cod and other fish imported into France from St. Pierre et Miquelon, France exports to the fishing grounds provisions of all kinds. The quantities of fish taken home by French boats, varied in value from 27,000,000 fr. in 1877, to 21,000,000 fr. in 1880, 37,000,000 fr. in 1886, 29,000,000 fr. in 1887, and 32,000,000 fr. in 1888. This profitable business was kept up artificially by a constant payment of bounties to French fishing vessels and fishermen to the extent of about 4,900,000 fr. a year.

The exports, mostly of stores, to St. Pierre et Miquelon, have not kept pace with the imports. They fell from 5,500,000 fr. in 1877 to 3,500,000 fr. in 1881, and have only since risen to 4,000,000 fr.

It might appear to be of no importance to take into account the trade of France with Pondichery and other French establishments in its vicinity. But France imports from India through Pondichery about 500,000*l.* worth of oil-seeds, and fruit every year. The exports of France to French India were not much in excess of 40,000*l.* in 1877. They hardly exceed 12,000*l.* in 1888. The colony is fed by British merchandise.

French Indo-China, which, for trading purposes, was limited to Cochinchina and Tonquin in 1887, has since that year comprised Tonquin, Annam, Cochinchina, and Cambodia, and these States now constitute a union for the receipt of customs. Between 1877 and 1886 the quantity of products shipped from Cochinchina and Tonquin to France seldom exceeded 80,000*l.* a year; after the customs union the goods shipped to all Indo-China amounted to 112,000*l.* in value. The exports from France to Indo-China, including military and other material, rose from 200,000*l.* in 1877 to 720,000*l.* in 1885, fell to 440,000*l.* in 1886, and again reached 744,000*l.* in 1888.

But in judging of French commercial policy in Indo-China, it is misleading to deal with the French part of Indo-Chinese trade alone. The whole of that trade, import and export combined, is stated here to have been worth 147,000,000 fr. (5,880,000*l.*) in 1887, and 140,000,000 fr. (5,600,000*l.*) in 1888.

The imports, according to the same authority, were, in 1887, 84,000,000 fr.; 1888, 68,000,000 fr. The exports, 1887, 63,000,000 fr.; 1888, 72,000,000 fr.; showing a decrease in imports partly balanced by an increase in exports. Many of the French Indo-Chinese community consider these statistics exaggerated; they maintain that the loss is more than 7,000,000, and that, however low it may have been, it was due to the establishment, in 1887, of a new tariff, modelled, with some exceptions, on the high general tariff of France, and applied to all goods, except French goods, in the direct trade.

Some light is shed upon this question by the latest statistics of Cochin-China alone, which were officially published at Saigon this summer.

The imports into Cochin-China from all quarters are given as follows:—

	1887.	1888.	Decrease.
	Francs.	Francs.	Francs.
France	15,180,545	9,680,273	5,500,272
French colonies..	3,937,609	3,144,182	793,426
Foreign countries	40,606,714	26,710,567	10,796,147
Total	59,624,868	42,535,022	17,089,846

The exports from Cochin-China to all quarters are noted as follows:—

	1887.	1888.	Decrease or Increase.
	Francs.	Francs.	Francs.
France .. .	1,197,499	1,963,803	+ 766,306
French colonies..	3,768,493	4,451,448	+ 682,955
Foreign countries	61,810,119	59,161,793	— 2,648,326
Total	66,776,111	65,577,046	— 1,199,065
Total trade	126,400,979	108,112,068	— 18,288,911

It appears that amongst the French imports into Cochin-China, which improved in 1888, cotton tissues were numbered. They are said to have gained 40,000*l*. But other French imports lost heavily, as we observe by the decrease of 5,500,000 fr. above given, and it was hardly worth while to introduce the French general tariff to produce this result. French establishments in the Pacific—viz., Tahiti, New Caledonia, and other islands—appear to have had no direct export of goods to the mother country before 1881, when the total quantity sent home was valued at 1,638,835 fr. (59,552*l*.). Later on the trade languished and was worth 348,593 fr. (13,940*l*.) in 1886, and but 253,681 fr. (10,144*l*.) in 1887, and only rose, thanks to a sudden demand for cobalt, to 1,686,398 fr. (627,392*l*.) in 1888. Exports from France to these Oceanic possessions began at 5,000,000 fr. (200,000*l*.) in 1881, and having risen to 6,000,000 fr. (240,000*l*.) in 1883, fell to 4,000,000 fr. (160,000*l*.) where they now remain. Differential treatment of foreign goods has not yet been allowed in these parts.

French Guyana closes the list with the following statistics :—

IMPORTS TO FRANCE.

						Francs.
1877	..	..	..	..	..	400,000
1886	..	..	..	..	..	240,000
1887	..	..	..	..	..	671,000
1888	..	..	..	..	..	250,000

EXPORTS FROM FRANCE.

						Francs.
1877	..	..	..	..	..	5,250,000
1886	..	..	..	..	..	4,500,000
1887	..	..	..	..	..	4,250,000
1888	..	..	..	..	..	5,510,000

The foregoing sketch shows that the trade of France with her colonies and possessions abroad is capable of improvement. It would be unsafe to predict that improvement will be sought in the enactment of liberal trade measures.

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AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1888
ON THE
TRADE OF RÉUNION.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 437.

*Issued during the Recess and Presented to both Houses of Parliament
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FRANCE.

RÉUNION.

Acting-Consul Bell to the Marquis of Salisbury.

My Lord,

Réunion, October 2, 1889.

I HAVE the honour to transmit to your Lordship, herewith, my Report on the Trade and Commerce of Réunion for the year 1888.

I have, &c.

(Signed) J. H. D. BELL.

Report on the Trade and Commerce of the Island of Réunion for the Year 1888.

The following figures give an idea of the state of commerce in General trade. the island during the year 1888, and contrast favourably with those of the year before :—

				£
Whole commercial movement in 1888	..	..		1,545,838
„ „ „ 1887	..	..		1,857,434
Increase in 1888	..	..	..	188,404

The sum of 188,404*l.* appears at first sight very insignificant; but when one compares it to the whole operations of the year, the result of the comparison shows that, proportionately speaking, the increase in trade during the past year has been very considerable.

It is my intention to confine the present report within the bounds of statistics, for the trade in British goods in this island is not such that its interests could be served by any remarks and suggestions.

It is true that about one-third of the importations are of British-Indian origin, but as these consist in commodities which constitute the basis of alimentation in this colony, the current of importations from India being once established, it will be no easy matter to turn its course in another direction.

Attempts have at different times been made to introduce rice *Rice.*

from Saigon, but these operations were attended with but little success, for the population, and more especially the Indian part of it, being used to Indian rice, are averse to any changes being brought into their habits in this respect.

Currency.

Last year I had the honour to point out in my report that a strong current of trade, favoured by a difference of currency and the natural fluctuation of exchange resulting from this condition, had set in between Réunion and Mauritius, and apparently in favour of the latter.

I am glad to be able to record a further increase of trade in importations from Mauritius—a fact that is amply verified on reference to the shipping returns, which show that, in 1888, Réunion received 80 vessels with 16,339 tons from Mauritius, whereas the year before there were but 45 with 10,614 tons.

TABLE showing the Value of the Exports and Imports during the Years 1887–88.

Year.	Exports.	Imports.
	£	£
1887	656,540	700,944
1888	645,198	900,640

Of the above figure, 900,640*l.*, French goods appear for 366,997*l.*, and foreign goods for 533,643*l.*

Among the foreign goods, India appears for 195,260*l.* worth, and Mauritius for 119,744*l.* The imports from Mauritius are principally Indian grain.

RETURN of the Principal Articles of Import to Réunion during the Years 1887–88.

Articles.		1888.		1887.	
		Quantity.	Value.	Quantity.	Value.
Rice	Tons ...	26,054	242,111	17,133	158,152
Claret	Barrels ...	13,934	83,221	10,698	69,428
"	Cases ...	597		647	
Tissues	" ...	665	76,365		69,143
Lard	Tons ...	665	33,558	481	31,120
Bullocks	Number ...	4,623	21,734	5,011	29,060
Coal	Tons ...	4,111	11,018	1,951	4,868
Codfish	" ...	597	16,581	615	18,232
Manure	" ...	403	3,155	467	3,652
Grain	" ...	1,543	11,900	1,608	12,152
Soap	Cases ...	24,774	10,708	8,236	3,792
Wheat	Tons ...	632	7,545	1,148	11,228
Various oils... ..	" ...		19,412		9,180
Flour... ..	" ...	1,206	18,886	658	9,792
Indian cloth	Bales ...	378	10,886	155	4,464
Dried and salted fish	Tons ...	649	9,012	406	8,868
Cigars and tobacco	" ...		8,363		2,788
Other articles	" ...		316,187		269,960
Total			900,640		700,944

RÉUNION.

Having made the foregoing gross statement, I shall now proceed to the dissection of the various items in the table, and give in detail, and in local denominations of weight and currency, the quantity of each article sold as well as the prices fetched on the local market:—

247,203 bags received direct from India sold at 18 fr. the bag. Rice.

101,934 bags from Mauritius fetched 17½ fr. per bag. The bags weighing 75 kilos. each.

4,567 bags from Madagascar found purchasers at 15 fr. 65 c. per bag of 75 kilos.

Madagascar rice is very white, and when boiled is gelatinous; but its nutritive properties are said to be inferior to Indian rice. It is for this reason, no doubt, that there is so limited a demand for it on this market.

5,566 bags, weighing 110 kilos., came from Australia, and Wheat. 420 bags of 75 kilos. from India. The price of wheat is 22 fr. per 75 kilos.

6,257 bags from Mauritius and 5,942 bags from Australia; each Flour. bag weighing 100 kilos., fetched 40 fr.

86 bags from France, and weighing 100 kilos., fetched 45 fr. each.

14,518 bags from Mauritius, and 6,492 bags from India; each Grain. bag weighing 75 kilos., fetched 14 fr. 75 c.

452,145 kilos. received from Madagascar, and sold at 30½ fr. Beans. the 100 kilos.

6,689 bags from Mauritius, and 1,502 bags from India, each Lentils. weighing 75 kilos., fetched 16 fr. 65 c. per bag.

Réunion is at the same time a lentil producing colony; but evidently not in sufficient quantity to meet the requirements of its inhabitants.

6,677 bags of 75 kilos. sold at 10 fr. per 100 kilos. This grain Maize. is also extensively grown in the island.

49,446 kilos., fetched 40 fr. per 100 kilos.

Oats.

98 bags of 100 kilos., sold at 300 fr. each.

Pepper.

Rio de la Plata supplied Réunion with 99 mules that fetched Mules. 410 fr. a piece; whereas 25 others from Poitou fetched 1,450 fr. each.

Only seven horses were introduced, in 1888, from France for Horse. the local Gendarmerie. They are estimated at 100% each on arrival here.

4,528 bullocks were imported from Madagascar, and realised Bullocks. 120 fr. a head.

Last year I casually mentioned that the "Bordeaux" and "Pro-Claret. vence" wines which are sent out to Réunion were of very third rate quality. Matters were getting so bad in this respect, that they called forth vehement protests from the population, who justly complained that they were being poisoned by unscrupulous wine merchants. The Government had to interfere, and ordered the seizure of all the wines imported, and their subjection to a careful analysis before being delivered to their owners.

Seven casks of different marks were accordingly immediately

seized at the custom house, and analysed; and the following table shows the percentage of each substance contained in the different casks:—

	A.	B.	C.	D.	E.	F.	G.
	Per cent.	Per cent.	Per cent.	Per cent.	Per cent.	Per cent.	Per cent.
Alcohol	15	14.8	17.1	13.3	17.0	12.8	11.5
"Extrait"	36	28.8	40.0	28.6	39.0	35.8	24.6
Ashes	5	5.4	4.5	4.8	4.6	4.8	2.6
"Sulfate de Potasse"	5 to 6	4.0	less than 4.0	less than 4.0	less than 4.0	less than 4.0	less than 4.0

The proportion of substances contained in wine, as authorised by the Municipal Laboratory of Paris, is:—

	Per cent.
Alcohol	13
"Extrait"	22 to 32
Ashes	2 „ 3
"Sulfate de Potasse"	1 „ 4

One has merely to cast a glance at the above table to see that the substances contained in the wines imported into Réunion, are not in the proportions sanctioned by law; and it is to be hoped that, the attention of the authorities having been drawn to the subject, wine merchants will learn that it is necessary to bring into their calculations of profit and loss, a little more consideration for the health of their customers.

In the past year 13,934 casks of "Bordeaux" and "Provence," containing 250 litres, were sold at 155 fr. each. 597 cases of bottled wine of a slightly superior quality fetched about 12 fr. per case of a dozen bottles.

Beer.

7,899 dozen bottles sold at 12 fr. per dozen. This is very inferior stuff and mostly German.

Vermouth.

5,437 cases of 12 litres, sold at 22½ fr. the case.

Cognac.

374 kegs of 100 litres, sold at 90 c. per litre.

The quality of the brandy which is sent to Réunion may be imagined when one hears that a case of it, containing 12 bottles, is sold at 19 fr.; and when it is added that 1,948 such cases were consumed in the past year by a comparatively small number of persons, one may well wonder that they are not all dead and buried.

Oils.

650 cases of a better brand fetched 35 fr. per case of 12 bottles.

Olive Oil.—4,303 cases of 12 bottles sold at 18½ fr. the case; and 1,434 cases of 12 litres fetched 23 fr. each.

Cocoanut Oil.—402 barrels of 250 litres, and 27 barrels of 100 litres, sold at 55 c. per litre.

Peanut Oil.—74 barrels of 250 litres sold at 75 c. the litre.

Petroleum Oil.—18,697 cases (of which 5,382 from Mauritius) containing 38 litres sold at 13½ fr.

Palma Christi Oil.—305 cases, each containing four tins of 19 litres, sold at 17 fr. per tin.

Turpentine.—186 cases of 12 litres, 181 demijohns of 12 litres, 58 busses of 12 litres, 22 cans of 50 litres, sold at 1 fr. 25 c. per litre.

Linseed Oil.—112 cases of 12 litres, 500 demijohns of 12 litres, 35 busses of 12 litres, 9 kegs of 50 litres, 96 cans of 50 litres, sold at 1 fr. 25 c. per litre.

22,960 fr. worth of other kinds of oil were imported in small quantities.

164 cases, containing $92\frac{1}{2}$ kilos. each, sold at 2 fr. 60 c. Butter. per kilo.

4,772 cases received from Mauritius (of these 3,180 cases of Lard. 60 kilos. originally came from Hong Kong, and 1,590 cases of 74 kilos. from India), sold at 1 fr. 45 c. per kilo.

1,170 cases of 74 kilos., received direct from India, fetched 1 fr. 50 c. per kilo.

1,590 cases of $92\frac{1}{2}$ kilos., from France, fetched 1 fr. 65 c. per kilo.; and 750 cases of 45 kilos., from America, sold at 1 fr. 50 c. per kilo.

304 cases of $12\frac{1}{2}$ kilos. sold at 15 fr. the case; and 145 barrels Tallow. of 50 kilos. sold at 1 fr. per kilo.

1,440 barrels of salt pork, weighing 45 kilos. each, sold at 50 fr. the barrel; and 359 barrels of the same, weighing $22\frac{1}{2}$ kilos., sold at 20 fr. per barrel. Salted meat.

107 barrels of salt beef, weighing 150 kilos., sold at 110 fr. the barrel; and 534 barrels of the same, weighing 75 kilos., sold at 40 fr. per barrel.

15,353 kilos. of various other salted meats were received and sold for 67,048 fr.

5,529 casks of 110 kilos. sold at 71 fr. the 100 kilos. Codfish.

951 barrels of 50 kilos. sold at 16 fr. 75 c. per barrel; and Mackerel. 205 barrels of $22\frac{1}{2}$ kilos. sold at 10 fr. per barrel.

816 cases, containing 100 tins and weighing $92\frac{1}{2}$ kilos., sold at 49 fr. each. Sardines.

11,894 bales of 45 kilos., from Mauritius, sold at 40 fr. per 100 kilos. Dried and salted fish.

93 bales of dried fish, weighing 50 kilos., sold at 30 fr. per 100 kilos.

600 bales of "Arab" fish, weighing 45 kilos., fetched 50 fr. per 100 kilos.

470 small cases of herrings sold at 4 fr. the case, and 149 barrels of the same sold at 15 fr. the barrel.

17 bales of dried sardines sold at 20 fr. the bale.

13 barrels of salmon, weighing 100 kilos., sold at 100 fr. per 100 kilos.

19,508 beams of deal 5 metres long fetched an average price Timber. of 1 fr. 80 c. per metre; and 5,184 planks of the same wood were sold at $2\frac{1}{2}$ fr. each.

8,266 cases, each containing 25 packets of five candles, sold at 19 fr. the case. Candles.

The price of coal last year was 75 fr. per ton. Coal.

18,584 cases of 20 kilos. sold at 13 fr. the case, and 6,195 Soap. cases of 15 kilos. sold at 6 fr. the case.

2,300 barrels of 100 kilos. sold at $10\frac{1}{3}$ fr. the barrel, and 330 Cement. barrels of 200 kilos sold at 25 fr. the barrel.

835,600 kilos. of salt received and sold at 75 fr. per 1,000 Salt. kilos.

Bricks.	56,835 bricks from Marseilles and Nantes sold at 275 fr. per 1,000.
Tiles.	23,700 tiles sold at 225 fr. per 1,000.
Tobacco.	37,590 kilos. of leaf tobacco sold at 5 fr. the kilo.; 162,300 cigars and 1,603 kilos. of manipulated tobacco at 8 fr. per kilo.
Vinegar.	5,398 demijohns of 12 litres sold at 6 fr. each, and 14 kegs of 100 litres at 40 c. the litre.
Tortoises.	1,941 tortoises from Madagascar were sold at 2 fr. each.
Cork.	286 bales, containing 10,000 corks each, sold at 6 fr. per 1,000 kilos.
Lime.	474 barrels of lime, weighing 250 kilos. each, were received from Nantes, and fetched 15 fr. per barrel.
Manure.	7,048 bags of 50 kilos., and 292 barrels of 200 kilos. (altogether 410,800 kilos.) sold at 200 fr. per 1,000 kilos.
Cheese.	37,949 kilos. of different kinds of cheese were sold at an average price of 2 fr. 25 c. per kilo.
Matches.	The matches that are almost exclusively used in Réunion are Swedish, and during the past year 203 cases, containing 40 gross boxes, were sold at 3 fr. 25 c. per gross.

RETURN of the Principal Articles of Export from Réunion during the Years 1887-88.

Articles.		1888.		1887.	
		Quantity.	Value.	Quantity.	Value.
Sugar	Tons	29,877	£ 474,563	34,443	£ 434,852
Vanilla	Lbs.	149,404	82,968	161,483	96,320
Rum	Gallons	141,332	7,723	268,979	12,224
Coffee	Tons	123	10,498	172	13,696
Potatoes	"	742	3,052	834	3,460
Fecula and Tapioca	"	649	10,860	630	8,644
Tobacco	Lbs.	114,779	7,616	118,967	2,692
Perfumes	"	3,563	3,450	2,785	2,532
Previously imported articles			63,922		78,524
Other articles			10,646		3,596
Total			645,198		656,540

Mussaenda.

At one time this Consulate was besieged by letters from merchants in England asking for information respecting a shrub called "Mussaenda"—the discovery of which, it had been said in some commercial journals, would deal a severe blow at the coffee and chicory trade.

About two years ago, some persons spread a rumour that the berry of this shrub could be advantageously employed as a substitute for coffee and chicory; but, as little attention was paid to these reports by the serious merchants, the matter very soon dropped into oblivion.

The true name of this shrub is "gaertnera." It grows to about 10 feet high, has very few leaves, and its branches are wide apart.

The berries do not grow all along the branches—as is the case with coffee,—but in bunches at the extremities of the branches.

At present, this shrub is only met with in the mountains where it has been planted by the hand of nature and grows in a wild state; but as they are widely disseminated over the forests, the picking of the fruit is not only an arduous, but, at the same time, an expensive process.

It is just possible that, if regular plantations of this shrub were undertaken, "Mussaenda" might be produced on an extensive scale, and much cheaper than at present; but even then it is much doubted whether, by reason of its inferiority in fragrance and colour, it could ever compete with coffee to such an extent as to endanger the trade of the latter, as it had been erroneously asserted in England.

During the year 1888, Réunion was visited by 184 ships of Shipping. different nationalities representing 81,499 tons.

The following table shows the principal countries whence these ships came, and distinguishes French from foreign vessels:—

Country.	French Ships.		Foreign Ships.		Total.	
	Number.	Tons.	Number.	Tons.	Number.	Tons.
France	22	18,571	2	930	24	19,501
India	19	10,943	7	3,680	26	14,623
Madagascar	10	3,914	23	16,795	33	20,709
Mauritius	43	9,388	37	6,951	80	16,339
Other countries	9	5,461	7	4,866	16	10,327
Total	103	48,277	81	33,222	184	81,499

The foregoing table does not include those steamers of the "Messageries Maritimes" Company that are subsidised by the French Government to do the mail service of this colony.

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REPORT FOR THE YEAR 1890
ON THE
FRENCH BUDGET.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 100.

Presented to both Houses of Parliament by Command of Her Majesty,
FEBRUARY, 1890.

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544. Lisbon	2d.	607. Trieste	1½d.
545. New York	1½d.	608. Tunis	1d.
546. San Francisco	1d.	609. Havana	2d.
547. Stettin	1½d.	610. Frankfort	1d.
548. San Salvador	1d.	611. Tabreez	1d.
549. Trebizond	1d.	612. Bilbao	1d.
550. Nice	1d.	613. Barcelona	1d.
551. Baghdad	1d.	614. Tokio	1d.
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566. Newchwang	1d.	629. Bushire	2½d.
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FRANCE.

PARIS.

Lord Lytton to the Marquis of Salisbury.

My Lord,

Paris, December 26, 1889.

I HAVE the honour to transmit herewith to your Lordship a Report by Mr. Egerton, on the French Budget for 1890.

I have, &c.

(Signed) LYTTON.

Report on the French Budget for 1890.

The French budget for 1890, which was passed in August, is entirely on the lines of its predecessor, and contains no novelty. The introduction of new measures was deferred till after the elections. No novelty in 1890 budget.

The increase in the amount of the estimates over that of the previous year is attributable to the old causes—additional expenditure in the Departments of War and Public Works.

The charges for the service of the debt and for pensions keep swelling, and there is also a higher charge for education.

The accounts of most of the Ministries show little or no change; there is a slight increase under Posts and Telegraphs, owing to payments to foreign companies and foreign contracts. The Colonial Department, as well as the Posts and Telegraphs, have been attached to the Ministry of Commerce; they were formerly under the Ministers of Marine and Finance respectively.

In the following comparative table, giving in sterling the main figures of the two budgets, the two Departments in question are classed as they exist at present :—

(793)

A 2

EXPENDITURE.

Comparative
table of
budgets of
1890 and
1889.

	1890.	1889.
1. Ordinary budget :—	£	£
Ministry of Finance	61,713,800	60,745,795
Justice and Public Worship ..	3,302,150	3,318,767
Foreign Affairs	569,140	570,568
Interior	2,882,230	2,938,441
War	22,253,340	22,023,096
Marine	8,125,930	8,197,564
Public Instruction and Arts ..	6,081,910	5,921,363
Commerce, Industry, Colonies, Posts and Telegraphs	8,629,740	8,674,448
Ministry of Agriculture	1,452,110	1,468,005
Public Works	6,830,450	6,622,140
Total	121,840,800	120,478,187
2. Extraordinary budget :—		
Ministry of War	6,160,290	5,542,172
3. Special budget	19,026,884	18,666,545
4. Supplementary budgets annexed to general budgets	3,755,270	3,479,720
5. Special credit opened for advances to French and Algerian railway companies for guaranteed interest	2,320,000	..

REVENUE.

	1890.	1889.
1. Ordinary budget :—	£	£
Direct and indirect taxes, duties, and stamps, &c.	92,928,010	91,529,450
State monopolies and industries	23,673,694	23,394,179
State domains and forests	1,708,254	1,775,765
Miscellaneous receipts	1,096,587	1,086,550
Exceptional receipts	30,677	531,477
“ Recettes d'ordre ”	2,419,478	2,169,739
Total	121,856,680	120,487,160
2. Extraordinary budget :—		
Treasury bills repayable not later than 1896 ..	..	..
3. Special receipts	19,026,880	..
4. Receipts from railways and divers sources and advances	3,755,270	3,479,720
5. Special credits met by Treasury bills repayable not later than 1896	..	..

The excess, therefore, of the estimated ordinary and extra-ordinary expenditure of 1890 over that of the previous year is very nearly 2,000,000*l*.

Consolidated
debt.

Terminable
annuities and
floating
debt.

The charges for the consolidated debt, the 4½ and 3 per cent, are, through amortization, reduced from 29,581,838*l*. to 29,562,396*l*.; but those for the terminable annuities and floating debt have, on the whole, swollen from 13,328,800*l*. to 14,338,434*l*. There has, of course, been the annual diminution—about 30,000*l*.—in the 3 per cent. terminable annuities of 1878; but, under this head, the

charge for short dated (sexennial) Treasury bonds has increased from 1,100,000*l.* to nearly 2,000,000*l.*, and the annual payments to the railway companies, from 1,480,182*l.* to 1,520,252*l.* The interest of the floating debt, moreover, is nearly 200,000*l.* more than in 1889, 980,440*l.*, as against 781,000*l.*

Pensions absorb 8,829,105*l.*; they were 8,782,139*l.* in 1889. Pensions.
The army pensions are now 3,700,000*l.*; the naval, 1,316,000*l.*; the civil pensions, 2,538,600*l.* They have all three increased, the civil by about 86,000*l.*

These sums do not exactly represent the cost to the State of the military and civil pensions, as under the heading of "recettes d'ordre" about 1,136,000*l.* is received from stoppages from pay—a sum which is yearly increasing.

There has been occasionally a benevolent tendency in the Chamber to propose additions to the pension list—thus in 1888, a motion was passed to provide the survivors or families of the wounded in the revolution of February with suitable pensions; in 1881 the sufferers by the "coup d'état" of December, or their widows and orphans, were given annuities; and comparatively lately the Chambers have retroactively applied to those who were already retired in 1881, the benefits of the military pensions law of that year.

The total amount of the military pensions has more than doubled since 1869, the naval pensions in the same period have nearly trebled.

In the general service of the Ministry of Finance there is a slight saving. The heading, "Commissions to the Trésoriers Payeurs Généraux," has disappeared; but the amount of their salaries has increased—the result of a change which, after a considerable debate, has been introduced with respect to the position of the officials in question. The Trésoriers Payeurs Généraux have since 1806 been employed in receiving, and in transmitting to the Treasury, the produce of the taxes collected by the "percepteurs," in centralising, so to speak, that produce, in paying the expenditure and at the same time also—subject to fixed regulations—in banking. The deposits of their clients they were in the habit of transferring to the Treasury, which paid them for their use a somewhat higher rate of interest than that which they, the Trésoriers, allowed their depositors. The Trésoriers Généraux are not allowed to deal in all classes of securities for their clients; there are restrictions as to the nature of the stock which they may buy or sell for them, thus all foreign bonds are tabooed, and none but the very best French securities allowed. At one time the Trésoriers received a slight percentage on all the taxes which they received before the time they were due. By thus stimulating the early entry of taxes they have been of undoubted use and convenience to the Treasury, whilst as bankers their Government connection gave them position and credit. There was an anomaly, however, in their position of public officials and private bankers, and it was held, moreover, that they facilitated Government extravagance by their deposits with the Treasury. Consequently, in

Modification
of system of
Trésoriers
Payeurs
Généraux.

1886, there was a measure proposed for the abolition of the various commissions and allowances of the Trésoriers Généraux, who were to be converted into mere officials, with salaries ranging from 400*l.* to 800*l.* per annum, and a further allowance of from 600*l.* to 1,200*l.* to cover their risks. They were to be merely left the right of receiving commissions on the sale and purchase of Government stock. This measure was frustrated by the budget committee; but, in 1889, a scheme has at length passed both Chambers, after much opposition, by which the Trésoriers are instituted into five classes at fixed salaries of from 500*l.* to 1,000*l.* a year, and their commissions for payments on budget account and account for advances to the floating debt are abolished, leaving them but the right to charge on sums passing through their hands which are unconnected with the state budget—such as accounts with the town of Paris, the “caisse des dépôts,” the “crédit foncier,” &c.

The Minister, M. Rouvier, in vain pointed out the false position thus created for the Trésoriers, who, responsible for losses on Government account, are left dependent on outsiders for their remuneration for the risks they incur.

The feeling of the Chamber, evidently in favour of abolishing the system of the “Receveurs Généraux” and their “comptecourant d’avances à la dette flottante,” seemed to lean towards making use of banks for receiving the in and out-going Government payments. There may be further modification, therefore, of the system in force.

Cost of
collection of
taxes
somewhat less.
Army
expenditure.

The cost of the collection of taxes, regie, &c., for 1890 is put at much the same figures as those of 1889. It is, indeed, somewhat less.

In the ordinary army expenditure the main increase has been for the pay of the infantry and cavalry (owing to the changes introduced in 1888), food, forage, and remounts; there is under the head of clothing a slight diminution.

In the extraordinary budget for the army the chief increased expenditure has been in field artillery and train, coast defences and rifles, in accordance with the War Minister’s scheme for the “transformation of the armaments and completion of the defences of France;” the total estimate for which, by the law of 1888, was limited to something under 15 million sterling, an account independent of the total estimated expenditure of 89,753,331*l.* which has been sanctioned for the “reorganization of the military resources” of the country.

It should be explained with reference to these figures, that in 1879 when the extraordinary war budget succeeded the “compte de liquidation,” instituted to make good the losses caused by the war, the credits required were so large that in 1881 the Chambers proposed a limit to the total estimated future expenditure (“prévisions de dépense”) of the department, and by the law of August of that year the amount was fixed at 91,720,000*l.*, which by the laws of February, 1887, and June, 1888, has been reduced by about two millions to the total mentioned above.

In 1885 and 1886 the extraordinary military budget was small

(2,360,000*l.* and 2,640,000*l.*); but in February, 1887, fresh expenditure began for the "transformation of the armaments, &c.," a fresh account was started which it is true is, by the law of 1888, kept within the limit of 15,000,000*l.*: but it was stated at the time by the "rapporteur" that that figure was insufficient, and that the real sum required was no less than 32,000,000*l.* M. Freycinet, moreover, in his speech on the scheme, admitted that his programme required beyond the 15,000,000*l.* in question, another 28,500,000*l.*, of which 22,500,000*l.* were for urgent and immediate needs.

The average extraordinary army expenditure outside the ordinary war budget of 22,000,000*l.* was from 1876-81 about 8,400,000*l.*, and from 1882-89 about 4,400,000*l.*, beyond an average ordinary budget of nearly 24,000,000*l.*

To return to the budget of 1890, the main items of the extraordinary expenditure are about 2,000,000*l.* for new rifles, and nearly 1,000,000*l.* for cartridges. The original vote proposed was much higher, but it was cut down.

A comparison between the marine budgets of 1889 and 1890 Navy Budget. show no specially increased expenditure under any heading, the total, indeed, is about 70,000*l.* less in 1890. The decrees of November, 1887, and September, 1888, were framed for a better control of the labour and store departments of the dockyards. Certain amounts are voted in each budget as a maximum for naval stores, on no account to be exceeded, in like manner as the checks now placed on expenditure for schools and public works. The sum fixed in 1890 is the same as in 1889.

The budget of the Ministry for Foreign Affairs likewise differs Ministry for Foreign Affairs. little from its predecessor; the charge for the Tunis and Madagascar residences are much the same, 6,600*l.* for the first, 26,500*l.* for the second.

The chief increase in the department for public instruction is Public instruction. in primary education, and the subventions to infant schools.

In the budget of the Ministry of Commerce we have the Post and telegraph offices. estimates of the Post and Telegraph Offices, which are as follows:—

	1890.	1889.
	£	£
Receipts	7,394,172	7,064,536
Expenditure	5,714,212	5,548,824
Net Revenue	1,679,960	1,515,712

The following are the sums provided as subventions to steamers carrying mails in 1890:—

To and from Corsica	24,200
New York and West Indies	438,320
Calais and Dover	4,000
Mediterranean Ports, Brazil and River Plate	77,193
India and China	266,805
Algeria, Tunis and Morocco	85,200
Australia and New Caledonia	123,164
East Coast of Africa	41,702
West Coast of Africa	20,034
Steamers of St. Louis and Rio Nuner Telegraph Company	12,000

Economies in
Colonial
Department.

In the Colonial Department there is less expenditure for the protectorates of Tonkin and Annam, 408,000*l.* instead of 420,000*l.* The Colonial budget is but 2,089,548*l.*, against 2,232,578*l.* in 1889.

Agricultural
Department.

There is no variation to speak of in the agricultural estimates. About 62,000*l.* is to be spent in measures against phylloxera and other insects; 80,000*l.* odd in encouraging horsebreeding; 56,000*l.* for buying horses and mares for the stud farms; 73,000*l.* in encouraging agricultural improvements and drainage; 66,000*l.* towards agricultural education; 55,000*l.* in aid of various agricultural institutions; and about 40,000*l.* in veterinary education; 2,200*l.* are voted for the destruction of wolves; 106,000*l.* is given towards water engineering, irrigation, or prevention of floods, &c.; assistance is also given to agricultural hydraulic companies, and hydraulic work is undertaken in Algeria.

Of late years, considerable curtailment of expenditure has been made in the Ministry of Agriculture—the total budget of which is 300,000*l.* less now than it was in 1884.

The charge for the management of the forests in 1890 is 620,000*l.*, the receipts 1,046,000*l.*; so that they are estimated to show a net profit of 426,000*l.*, which is a little more than that of 1889.

Public works.

In the estimates of the Ministry for Public Works about 1,200,000*l.* instead of 1,000,000*l.* are charged for guaranteed interest to the railway companies.

These payments on railway account are distinct from the 1,520,252*l.* in the accounts of the Ministry of Finance, to which allusion has been already made. The latter are annuities paid by the State (under the law of 1874) to clear off the debt to the railways either for advances made by the latter, or for subventions. These annuities gradually increase in amount for the next fifty years, till they reach a total of about 2,100,000*l.*, after which it is calculated that they will be rapidly extinguished, ceasing altogether in 1961. The service of these annuities was transferred to the Ministry of Finance on the completion of the works on 11 lines.

The amount of annual payments by the Ministry for Public Works to railway companies, is 700,000*l.* under the conventions of 1883, besides 471,000*l.* for other railway guarantees. These payments are made by the proceeds of the issue of bonds, the total of which is rapidly increasing (as will be found by reference to the

special credit which forms the fifth division of the general budget). It was 13,500,000*l.* on January 1, 1889, and in that year 3,000,000*l.* have to be added to it; in 1890, 2,320,000*l.*

Meanwhile, the railway companies are rapidly reducing the portion of the charges thrown upon them by the re-arrangement of 1883. The 22,000,000*l.* which they agreed to devote to railway construction—relieving the Government by this anticipated repayment of its advances—has been worked down in 1889 to 7,500,000*l.*, and thus the State will have to bear a greater part of the annual outlay of the railway construction project. At the present rate, it is calculated by critics of M. Freycinet's project, and its subsequent modification, that the annual charge under this head may reach the considerable total of 3,400,000*l.* without including the 2,100,000*l.* (under the law of 1874) in the budget of the Ministry of Finance, which with the annual arrears of the bonds issued for the service of the guaranteed interest may possibly bring the whole annual payment on railway account in the budget to the sum of 6,000,000*l.*

The following is a comparative statement of the revenue in the budgets of 1890 and 1889:—

	1890.	1889.
	£	£
Direct taxes	17,936,440	17,794,394
Registration, mortgage dues, &c. ..	20,517,768	20,677,920
Stamps	6,557,256	6,469,580
3 per cent. on movable property ..	2,024,860	1,963,300
Customs	15,375,870	14,227,416
Indirect taxes on liquors, railways, cards, &c. ..	23,367,816	23,374,440
Sugar, customs on foreign .. £1,360,000	7,148,000	7,022,400
" " colonial .. 680,000		
" excise 5,108,000		
Farming of manufacture of matches £680,460	15,931,348	15,980,576
Tobacco Regie 14,757,972		
Gunpowder Regie 492,916		
Post office	6,030,636	5,782,540
Telegraphs,	1,363,536	1,281,996
Profits from mint, Tonkin cable, printing office, and State railways	348,174	349,067
State domains £661,410	1,708,254	1,775,765
Forests 1,046,844		
Miscellaneous		
Exceptional repayment by Uruguay	1,096,567	1,036,550
Divers receipts and reimbursements (recettes d'ordre)	30,677	531,477
	2,419,478	2,169,739
	121,856,680	120,487,160

ESTIMATED Produce of Direct Taxes.

	1890.	1889.
	£	£
Real property tax—land	4,741,920	4,742,000
houses	2,538,000	2,496,000
Personal ("personnelle mobilière")	3,002,220	2,925,000
Doors and window tax	1,972,916	1,936,176
Tax on professions ("patentes")	4,166,016	4,155,776
"Taxe de premier avertissement"	24,360	24,864
	16,444,032	16,279,936

SPECIAL Taxes assimilated to Direct Taxes.

	1890.	1889.
	£	£
Mortmain	280,000	276,000
Mines	96,000	100,000
Examination { Weights and measures	186,200	186,200
of { Alcohometers	560	734
Chemist shops and stores	11,620	11,620
Inspection of manufactories	740	740
Carriages, horses, and mules	461,300	455,944
Billiard tables	46,800	48,000
Clubs and assemblies	58,000	58,000
	1,141,220	1,137,238
Algerian taxes	351,188	377,220

Registration
and succession
dues unelastic
at present.

Without following in full detail, in this provisional and unobtrusive budget of 1890, the indirect taxes as compared with those of 1889, it is well to point to the modest estimate of certain registration dues, the "transmissions entre vifs" and "mutations par décès," which are put at about 100,000*l.* less. The whole proceeds of registration being estimated 160,000*l.* lower than in 1889, which year was inferior again to its predecessor. The stamp tax and 3 per cent. tax on "valeurs mobilières" show a very satisfactory advance.

Increase in
customs.

The customs are expected to produce about 44,000,000*l.*, an increase of nearly a million; the liquor excise about 16,500,000*l.*, about the same as in 1889; the wine duties being somewhat higher, about 5,860,000*l.* instead of 5,754,000*l.*; but the spirit and beer duties less, viz., 9,794,240*l.* and 856,538*l.* respectively, as against 9,843,200*l.* and 892,360*l.* in 1889.

Lucifer
match mono-
poly under-
taken by
Government.

As regards the State Monopolies, the estimates for which in the last two budgets are very similar, a change is impending as regards lucifer matches—the manufacture of which has been farmed of late. The Government has decided again to undertake their fabrication, and to avoid some of the expense of creating a special department will put much of it under the tobacco regime. Thus the directors of the tobacco manufactories at Marseilles,

Nancy, and Bordeaux will supervise the lucifer match establishments at Marseilles, Blenod, and Begle. There will be 6 factories in all instead of 7 as at present—Pantin and Aubervilliers being amalgamated. There does not seem general acquiescence in the Government undertaking this monopoly—the vote to sanction which is an annual one. The budget is modified by this change, a clear net profit to the State of about 160,000*l.* being estimated for 1890. The sum of 680,000*l.* due from the farmers of the monopoly must be annulled, and an item of 1,000,000*l.* of receipts from the State manufacture substituted. A credit of 155,606*l.* is granted to the Ministry of Finance for starting the business, and of 213,580*l.* for purchases of stock and various other arrangements with the company who have been hitherto undertaking it.

Amongst miscellaneous receipts, the diplomatic and consular chancelleries bring in about 40,000*l.*; the work of prisoners in gaols, about 180,000*l.*; of those in penitentiaries in Guyana and New Caledonia, 25,000*l.* Miscellaneous receipts.

The annual payment from the Republic of Andorra amounts to 38*l.* Remuneration for railway inspection in France, Algeria, and the Colonies is put at about 170,000*l.*

Under the “*recettes d'ordre*” the produce of fines is 333,394*l.* The deductions from civil salaries for pensions, 980,934*l.*; from military salaries for pensions, 200,000*l.*; from naval salaries for pensions, 129,136*l.*

It must be remembered in comparing the figures of the budgets of 1889 and 1890, that the latter is free from the charges for the Exhibition, towards which 158,732*l.* were voted for 1889, and 79,692*l.* for 1888.

In the “*Budget sur ressources speciales*,” the local government Budget for taxes collected by the State are estimated for 1890, as follows:— local government.

DIRECT TAXES.					£
Real property tax—land	..	..	..	..	5,442,102
“ “ houses	..	..	..	..	2,958,826
Personal (“ <i>personnelle mobilière</i> ”)	..	..	..	..	2,856,767
Doors and windows tax	..	..	..	..	1,875,767
Tax on professions	..	..	..	..	2,900,048
“ <i>Taxe de premier avertissement</i> ”	..	..	..	..	17,350
					15,550,860
Other taxes, Algerian, Arab, assimilated, and					
miscellaneous	..	..	..	..	3,476,024
Total	..	..	..	..	19,026,884

This budget was created in July, 1862, to free the ordinary budget from accounts of expenditure voted by the local councils, while the State still maintains its right of supreme control.

The receipts and expenditure of the departments appear in this special budget, the “*centimes additionnels*” imposed on the communes, the uses to which they are devoted, the miscellaneous revenue and its employment, “*non valeurs*,” &c. This budget is, therefore, entirely distinct from the Government budget; the same collectors it is true encash the direct taxes of the Government as

well as the "centimes additionnels" of the communes; the final sanction of the central authority may be requisite, but, as a matter of fact, the local councils vote and control their own budget, which by thus being appended to the State budget are pro formâ submitted as well to the inspection of Parliament.

In 1886 Monsieur Peytral brought in a Bill for entirely suppressing this annex to the budget, and for leaving the communes and department apparent as well as real control over their own affairs; but this was rejected by the Senate.

In this budget, which is never in deficit, the receipts precede the expenditure owing to the fact of the State collecting the departmental taxes and making the payments only as it receives them.

The heading "fonds de non valeurs" in this special budget relates to the "centimes additionnels" imposed to cover losses from floods, fires, and special causes, rebatement of taxation, &c. This fund has generally a large surplus carried over from year to year, which is managed by the Government for the benefit of the tax payers. On two, indeed three occasions, the Government has violated these "fonds de non valeurs," in 1863 and 1866, to contribute to the cost of the Mexican war, and again in 1884.

The special budget is not wound up at the end of the financial year, and should there be any small balance (in theory the accounts should perfectly correspond) it is carried on to the next year. The "exercice" of the departmental budget ends two months after that of the ordinary State budget.

The supplementary budgets.

The supplementary budgets, "annexes pour ordre au budget général," consist of seven small budgets concerning the mint, national savings' bank, national printing office, legion of honour, naval pensioners' fund, central school of arts and manufactures, and State railways (of which at present about 2,597 kilos. are being worked).

It is their industrial or quasi-industrial character that has excluded these establishments from the ordinary budget. They balance their budget in form, but, as a fact, the mint brings in about 2,500*l.* net profit in 1890; the printing house, 7,320*l.*; and the State railways nearly 300,000*l.* The legion of honour costs about 400,000*l.* a year net, and the naval pensioners' fund about 300,000*l.* The school of arts appears to balance its receipts and expenditure, and the national postal savings bank gives an excess of 30,000*l.* towards its own dotation.

These supplementary budgets are, therefore, merely the estimates of certain industrial undertakings administered by the State; though "industrial" is a term which does not very exactly apply to the legion of honour and the "caisse des invalides de la marine," notwithstanding that both are possessed of real property.

"Services spéciaux du trésor" for advances to railways.

The fifth heading of the budget is a recent innovation, and consists only of repayable advances under the conventions of 1883, &c., to certain railways, which on the plea of being mere loans are ingeniously separated from the ordinary budget, and relieve it.

In 1889, the amount of these advances was put at 3,000,000*l.*

in 1890 the credits voted are less than were first asked for, amounting to 2,320,000*l.*, of which 1,360,000*l.* are for French and 960,000*l.* for Algerian railroads.

Having concluded the comparison between the budgets of 1889 and 1890, I should mention that the accounts of the "exercice" of 1888, just concluded, show a surplus of 1,906,370*l.*; the total receipts having been 124,313,542*l.* This was the year when the extraordinary expenditure for public works was first brought into the ordinary budget, bringing to the latter an increased charge of nearly 2,000,000*l.*

Final accounts of 1888 show good surplus.

The surplus in question is in great measure owing to the sugar excise and corn duty.

The returns of 1889 so far are not quite so satisfactory—indeed, without the help of certain "annulations de crédit," they may not show a surplus. The provisions of the budget in some cases, more especially as regards the registrations (mutations), stamps, and 3 per cent. tax, not having been fulfilled.

Final accounts of 1889 not so satisfactory, though they may balance.

It may appear singular to those unfamiliar with the French system of budget "exercices," that in March, 1889, the final accounts of the budget of 1876 came before the Chamber for approval—an item of 6,000 fr. being objected to. This delay does not appear to be attributable so much to slowness of the different Ministries, or of the Cour des Comptes in auditing the accounts of that year, but to the inaction of the Chamber itself. The public comment on this occasion will probably prevent the recurrence of similar unnecessary delays.

Delays in auditing budgets.

A grave inconvenience to those responsible for the finance is the power and practise of individuals of the French Chambers to make additions to the Government estimates by proposals entailing fresh expenditure—to tinker the budget with taxation schemes of their own. Thus an amendment in the budget was passed last summer at the initiative of certain deputies, with respect to the "timbre des récépissés," a stamp on freights sent by luggage trains. This amendment abolished the fixed stamp of 70 cents. per packet, and introduced a scale of 20 cents. for goods paying less than 3 fr.; up to 2 fr. 10 cents., on goods the charge for conveying which is not less than 100 fr. In case the goods are put together into one lot ("groupé"), the amount of the duty on each of the parcels is the rate immediately below in the scale the duty that would be due on the collective receipt—that is to say, should the whole amount require a stamp of 2 fr. 10 cents., each of the parcels composing it must have a stamp of 1 fr. 10 cents., a duty which would be fatal to the system of "groupage" (forwarding agencies), and entail an annual loss to the Government of nearly 120,000*l.*

Tinkering of budgets by the Chambers an evil.

"Timbre des récépissés."

No time has been lost, therefore, in the autumn sitting in bringing up the question of the duties on "récépissés," and in cancelling the project evolved in the budget discussions before the dissolution, and forced on the unwilling Senate. Eventually Government may propose a modification of the present duty on "récépissés," which certainly weighs unduly on small and cheap parcels.

absorption of the extraordinary budget for public works into the ordinary budget of 1888, the accounts of which have been settled with a surplus of between 1,000,000*l.* or 2,000,000*l.*

He contrasted the financial management of the previous Parliament, which, from 1882 to 1885, added about 96,500,000*l.* to the debt, with that of the Parliament which he was addressing, which had borrowed but 42,000,000*l.*

The average annual borrowing having fallen from about 24,000,000*l.* to 14,000,000*l.* The floating debt, which, on the 1st of January, 1886, stood at 52,666,666*l.*, was 36,000,000*l.* odd in 1890.

Deducting from the budget the enormous charge for the debt, about 52,000,000*l.* odd; the cost of collecting the revenue, about 14,000,000*l.*; the army and navy, 30,000,000*l.* odd; and the public works and public instruction expenditure, he pointed to the remainder, 12,000,000*l.*, as a small sum to pay for the home Government, justice, religion, commerce, and arts, foreign affairs, and colonial Government of such a power as France. A satisfactory proof in his opinion that the French Administration is exceptionally economical.

As for the schools, there were, in 1888, 6,351,000 attending them, whilst in 1875 there were but 4,609,700.

The returns of the traffic on the rivers and canals gave 1,953,000,000 tons as carried a kilometre in 1875; in 1887, 3,073,000,000 kilometric tons; in reality, 23,028,436 tons (within the last ten years the interior water communications having been largely developed).

The movement in the sea ports was 14,000,000 tons in 1877; in 1887 it was 22,500,000 tons.

In 1877, 763,000,000 of letters, papers, and parcels were sent by post; in 1887, 1,317,000,000.

There were 7,000,000 telegrams in 1877; in 1887, 22,000,000.

In 1876, 12,500 miles of railways carried 136,987,000 passengers, and 61,836,000 tons of goods; in 1887, 20,950 miles of railways carried 226,571,000 passengers, and 80,285,000 tons of goods.

In 1876 again the taxed share dividends of public companies in France was about 18,000,000*l.*, the taxed interest of bonds, 23,000,000*l.*; in 1887 they were 24,000,000*l.* and 33,000,000*l.* respectively. It is true in 1882 before the "Union Générale" disaster the share dividends were even larger.

The four chief banking houses in France had, in 1888, 36,000,000*l.* of deposits, instead of 22,000,000*l.*, as in 1876.

Through the *Chambre de Compensation* in Paris (answering to the Clearing-house), nearly 217,000,000*l.* passed last year against 88,000,000*l.* in 1878—more than in the years of the Greatest prosperity, 1881 and 1882.

The succession duties, in which it is observed that there has been falling off of late, brought in much more in 1888 than in 1877—216,000,000*l.* of property paid this duty, against 177,000,000*l.* in 1877.

The total funds of the mutual aid and benevolent societies which, in 1881, were 1,360,000*l.*, in 1888 were 2,200,000*l.*

The savings bank deposits which, in 1852, were but 1,300,000*l.*, and, in 1878, 44,000,000*l.*, have, in 1889 (notwithstanding the large sums withdrawn about 1887), reached the amount of 120,000,000*l.*, and are steadily increasing; the number of depositors having risen from 893,000 in 1855 to 6,492,000 in 1889, or one in six of the population.

The deposits invested in Government securities by the National Savings Bank alone amounted in 1888 to nearly 9,000,000*l.*

I have ventured to quote some of M. Rouvier's arguments and figures, as he points out clearly the progress made in France even during the years of depression—industrial and agricultural—from which she now appears emerging.

It is almost impossible to realise the vastness of the national loss caused by the *phylloxera*—a loss in great measure repaired.

Governments in France of late have had to meet bad times, burthened with expenditure commenced by their predecessors with amiable prodigality in days of plenty and prosperity—the burthens still remain, but the back that has to bear them is stronger, though the distribution of wealth may have been modified.

The budget for 1891 is awaited with the greatest interest. It is easy for theoretical observers to suggest ways by which financial difficulties may be got over, and fortunately in the case of France no material reason exists why the necessary sacrifice should not be imposed on the nation to enable it to clear up arrears and start square; but for outsiders it is hard to gauge the impediments to be met by a Finance Minister in carrying through a wholesome and drastic policy, evident though it may be that a bold, straightforward facing of obstacles is generally the safest course.

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DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1889
ON THE
AGRICULTURE OF THE CONSULAR DISTRICT OF
CHERBOURG.

Presented to both Houses of Parliament by Command of Her Majesty,
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1890.

[C. 5895—45.]

Price One Halfpenny.

Wheat. The wheat crop has also been above the average, and brought in very favourably, the weight for a given measure being much more than is usual.

In 1889, following on previous bad years, there has been an almost total failure of the apple crop, not only in La Manche, but in the adjoining departments; consequently, to supply the requirements of the inhabitants for cider, the usual beverage, it has become necessary to import apples from abroad, and from other parts of France; simultaneously, since the partial destruction of the vines, a demand for cider has arisen in Paris, and other localities where formerly the consumption of this liquor was scarcely thought of. The immediate effect of these causes has been a continuous rise in the price of cider, and, as a consequence, to direct the serious attention of farmers to their orchards, which were gradually being allowed to go to decay without replacement; now, not only are the old orchards being renewed, but many new ones are established throughout the country.

Ille et Vilaine. Mr. Vice-Consul Henniker Major reports as follows on the agriculture of the district of St. Malo for the year 1889:—

The early part of the year was somewhat detrimental to grain crops, easterly winds, cold nights, and want of rain in the month of May having injured a considerable area. Both wheat and barley were much improved by the rain of June, but July being inclement the yield of the former cereal especially was not so good as usual, particularly around Dinan, though in the Department of Ille et Vilaine the sample was better. Barley has been, nevertheless, a fair crop, and very well harvested, besides being fairly clean, and considerable shipments have taken place from this port for London and Ipswich. There still remains a considerable quantity for shipment.

Oats. Oats were an average crop. The growth of this grain is limited here, generally, to the necessary supply of the farm team, leaving little for sale.

Buck-wheat. Buck-wheat has been a good crop, but the somewhat rainy season at the time of sowing prevented the later crops being sown to time, and consequently the harvest was late, only the earlier sown being sufficiently well harvested for exportation, the large bulk there would have been for exportation being thereby greatly reduced. Several cargoes, nevertheless, have been shipped for Rotterdam and Amsterdam.

Apples. Apple trees were much damaged by cold winds, and later on by caterpillars; there has been very great dearth of apples this year, 1,200 tons imported from Spain sold at from 7*l.* 5*s.* to 7*l.* 10*s.* per ton, or more than double the price in a bad year in this country. Poorer people have made cider from dried raisins, dried apples (sliced), barm, gin and some water added, this being allowed to ferment for awhile, being eventually bottled. Even farmers have augmented their supply by this means.

Potatoes. Potatoes, both early and late, were much diseased, the former so much so that considerable loss took place in transit to England. The season for shipping was very short, and far from profitable to

growers. The late potatoes rotted in the ground, and the yield was consequently small at harvesting time.

Roots of all sorts did well, but their cultivation is limited, except as a second crop.

Around St. Malo and Paramé the cultivation is improving, but the prices have been small, and there is not sufficient demand to encourage cultivation, rates of transport being too high.

Prices ruling at present are :—

Prices.

				Per Sack (100 Kilos.) *			
				Fr. c.	Fr. c.	s. d.	s. d.
Wheat	..	..	..	23 50		= 18	9½
Barley	..	..	..	15 0		= 12	0
Oats	..	..	..	16 0 to 17 0		= 12 0 to 13 6	
Buck-wheat	..	..	..	12 0	13 0	= 9 6	10 6
Potatoes (flukes)	..	..	..	12 0	14 0	= 9 6	11 3
" (common rounds)				5 0	6 0	= 4 0	4 9

Early potatoes varied in price during season from 6 fr. at first for Myatt's to 1 fr. a month later for rounds.

Mr. Vice-Consul de Veulle makes the following observations on the agriculture of the district of Le Maus in 1889.

A greater quantity of barley has been exported than during the years 1887 and 1888, in those years the harvest took place in damp weather, and the quality and colour were inferior, but this year this grain has been harvested in excellent condition, and the quality and colour have consequently been good, and such as English brewers esteem. Large quantities of barley have been sent to Germany.

There is a slight increase in seeds, owing to the clover seed crop being very good in quantity and quality, though the grain is small the colour is good. Very little has been done in rye grass seed, though it has been and is still very cheap as compared with former years, English merchants have been moderate in their demands. Important quantities of clover seed have been bought by German merchants.

The fruit crop has been a complete failure, although by the fine appearance of the trees in the spring a heavy yield was expected, but blight and caterpillars, especially the latter, ruined all hopes, and in many districts the trees were stripped of their leaves, and had the same appearance as in winter. The complete failure of the cider apple crop is much felt by the working classes, the price of cider being out of their reach.

* 100 kilogrammes = 1 cwt. 3 qrs. 24 lbs. 7 ozs.

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FRANCE.

REPORT FOR THE YEAR 1889
ON THE
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[C. 5895—58.]

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FRANCE.

PARIS.

The Earl of Lytton to the Marquis of Salisbury.

My Lord, *Paris, February 20, 1890.*

I HAVE the honour to transmit herewith to your Lordship a Despatch from Mr. Crowe, enclosing his Report on the Trade and Commerce of France for 1889.

I have, &c. (for the Ambassador),
(Signed) EDWIN H. EGERTON.

Mr. J. A. Crowe to the Earl of Lytton.

My Lord, *Paris, February 20, 1890.*

I HAVE the honour to inclose a Report on French Trade and Commerce in 1889.

I have, &c.
(Signed) J. A. CROWE.

Report on French Revenue, Trade, and Commerce in 1889.

In respect of French revenue, trade and commerce, the year which has just expired appears to have been exceptionally favourable. The value of imports rose from 4,107,008,000 fr. in 1888, to 4,175,015,000 fr. in 1889 (164,280,320*l.* to 167,000,600*l.*), an advance of 68,000,000 fr. (2,720,000*l.*). Exports, which had been worth 3,246,749,000 fr. in 1888, went up in 1889 to 3,608,582,000 fr. (130,869,260*l.* to 144,343,280*l.*), difference in increase, 13,473,000*l.*

The revenue of 1889, being 3,241,682,400 fr., as against 3,214,263,900 fr. in 1888, showed an advance of 27,418,500 fr. (1,096,740*l.*).

This favourable situation will be found to have been accompanied by a certain number of disappointing circumstances. As regards imports, food products fell off by 81,000,000 fr. (3,240,000*l.*), whilst raw materials increased by 101,000,000 fr. Proportion of various species of goods.

(4,040,000*l.*), but manufactured articles showed a decrease of no less than 35,300,000 fr. (1,412,000). Exports of manufactured goods displayed an improvement of 156,000,000 fr. (6,240,000*l.*), but more food products to the extent of 117,000,000 fr. (4,680,000*l.*), and more raw materials to the amount of 85,000,000 fr. (3,400,000*l.*), left the country.

Detail of
revenue.

The increase in the revenue was concentrated on a few items. There was a great falling-off in four great sources, viz:—registration fees, moveable property tax, customs, and sugar. On the first, the outfall was nearly 7,000,000 fr. (280,000*l.*), on the second, 1,259,500 fr. (50,380*l.*), on the third, 9,495,500 fr. (379,820*l.*), on the fourth, 18,412,500 fr. (736,500*l.*). Direct taxes, on the other hand, improved by 7,389,600 fr. (29,584*l.*), drink, licence, and railway duties by 24,381,400 fr. (975,256*l.*), tobacco by 4,303,200 fr. (172,128*l.*), post office and telegraphs by 12,611,700 fr. (504,468*l.*).

Prosperity due
to the great
exhibition.

The advance in the yield of revenue was therefore due to the influx of strangers and tourists to the world's fair of the Paris Exhibition, which produced such an additional amount of travelling, drinking, smoking, carriage of letters, and despatching of telegrams, that a surplus of more than 1,000,000*l.* sterling was realised on that account.

Expansion of
traffic and
business in
Paris.

Paris, it would seem, reaped a good deal of the profit of the windfall of the Exhibition. For instance, in 1888 the receipts of the *octroi* of Paris were 140,789,584 fr. (5,631,580*l.*), whereas in 1889 they rose to 150,774,405 fr. (6,030,976*l.*). The increase of 9,984,820 fr. (399,392*l.*) in favour of 1889 is due to the crowd of consumers which gathered during the exhibition months. When the exhibition closed the *octroi* instantly fell off to a point below that of the same period in 1888. The receipts of *octroi* for December, 1889, were 14,815,229 fr. (592,608*l.*); those of December, 1888, had been 15,023,265 fr. (600,928*l.*). The overflowing town dues were, no doubt, paid by the visitors to the exhibition, who entered the grounds to the number of 28,000,000, and proportionally added to the general consumption. The same visitors crowded the theatres and places of public entertainment, which instead of yielding 25,000,000 fr. and 26,000,000 fr., as in 1885 and 1886, earned over 32,000,000 fr. (1,280,000*l.*). Some idea of the current of business in Paris during May, June, and July, 1888-89, will be formed by a comparison of the passenger traffic during those months in the two years in millions of francs:—

Traffic
receipts.

		Millions of Francs.	
		1888.	1889.
Travellers from Paris	..	9·7	10·7
„ to Paris	..	9·6	10·7

Inside Paris the local river steamboats carried, in millions of passengers, in 1888, 4·6; in 1889, 11·0. The railway receipts

for 1889 will be about 1,100,000,000 fr. (44,000,000*l.*), as against 1,024,000,000 fr. (40,960,000*l.*) in 1888. The railway receipts for May, June, July, and August alone rose from 353,200,000 fr. in 1888, to 387,100,000 fr. in 1889; the number of visitors to Paris hotels in the same months increased from 244,511 in 1888 to 533,025 in 1889.

The consumption of sheep in Paris advanced from 465,000 head in the months of May, June, and July, 1888, to 475,000 head in the corresponding period of 1889; and there was a moderate increase at the same time in the consumption of veal and pork, whilst the demand for beef remained stationary. Food consumed.

It was all the more fortunate for France that these contributions to her prosperity were made immediately after the time when (the Panama Canal Company having gone into liquidation, after swallowing up a capital of 51,500,000*l.*), the failure of the great copper syndicate led to the collapse of the Comptoir d'Escompte for something like 3,000,000*l.* sterling. This collapse was only prevented from creating a panic and a run of a disastrous kind on the savings banks of the country by the energetic call made upon the credit of the Bank of France and other banking establishments of the capital by the Finance Minister. Financial straightens.

But there were other causes which gave an impulse to prosperity, and one of the principal ones was a bountiful harvest.

The area sown in wheat in 1889 was larger than any since 1885, viz., 7,160,026 hectares, or 17,000,000 acres; the crop rose to 111,460,218 hectolitres, or about 38,000,000 quarters, from 98,740,000 hectolitres, or 33,500,000 quarters, in 1888. The average weight per hectolitre of French wheat was 77.2 kilos. in 1888, as against 73.8 kilos. in 1888; the weight therefore of the wheat crop of 1889 was 86,692,099 metric quintals, as against 79,005,508 metric quintals in 1888. Good harvest.

The area sown in rye—much the same as that of 1888—yielded 25,000,000 hectolitres, or 9,000,000 quarters, more than in 1888. The French thus enjoyed a good corn harvest in the year which has just expired. The price in Paris, 23 fr. 75 cents. per quintal for wheat, instead of 24 fr., which was the average in 1888, rye 15 fr. per quintal as in 1888; oats 18 fr. 75 cents. per quintal, an advance upon 17 fr. 15 cents. in 1888, were not much lower than the prices of a less abundant year.

The production of beetroot and the sugar derived from it, likewise increased in a remarkable manner, having yielded 446,399,658 kilos. of raw, in the season 1888–89, as against 374,217,142 kilos. of raw in 1887–88. The French market went through all the changes which marked prices during the year, when raw sugar rose from 14*s.* a cwt. in January 1889, to 28*s.* in July, to fall then to 11*s.* 6*d.* a cwt. at the opening of 1890; but the growers realised all the more profits, as they had larger crops to dispose of. We shall presently see what the imports and exports were. Beetroot sugar.

Spirits. Distillers likewise had a good year. The cottage stills ("bouillage de cru") produced 59,000 hectolitres of spirits; being 2,000 hectolitres more than in 1888, the distilleries making 2,185,806 hectolitres in 1889, against 2,105,479 hectolitres in 1888.

Strikes in many parts of the country proved that workmen had the wish, and sometimes the power to secure a larger amount of wages, where prices showed a tendency to rise. There is no doubt that wages have risen in France all round. We register one exception indeed to the general prosperity. According to the valuations of the direction of indirect taxes, the quantity of wine produced in 1889 was 23,223,600 hectolitres (510,917,200 imperial gallons), as against 30,102,100 hectolitres (662,246,200 imperial gallons) in 1888. Phylloxera invaded three new departments, Aube, Sarthe, and Haute Marne. Mildew and black rot were destructive; rain injured the bloom in places. Summer droughts in Southern France prevented the grain from expanding; hail and premature frost in August, September, and October, prevented ripening in the W. and S.W. departments. The yield was moderately good in the south, in Champagne and Burgundy, elsewhere it was below an average; and sugar was much used for counteracting acidity, though not nearly in the large proportion of 1888, *i.e.*, 19,000,000 kilos. in 1889, as against 36,000,000 kilos. in 1888.

Contrary to what we might expect, the paucity of the crop was not made up by increased production of artificial wines from grapes or raisins. The make of wine from grapes and raisins fell from 4,693,000 hectolitres (103,246,000 imperial gallons) to 3,305,000 hectolitres (72,710,000 imperial gallons). Under the pressure put upon Italian wine imports by a differential tariff, the Algerian vineyards expanded from 88,326 hectolitres to 94,842 hectolitres, and Algeria sent 1,591,922 hectolitres (35,022,284 imperial gallons) of wine to France in 1889, instead of 1,234,319 hectolitres (27,155,018 imperial gallons) in 1888. But the imports of wine into France were, on the whole, much less than usual—10,636,000 in 1889, instead of 12,305,773 hectolitres in 1888 (233,992,000 imperial gallons, instead of 270,727,006 imperial gallons). Spain furnished most of the supply. And the decrease of imports, coupled with decrease of artificial wine, must have been counterbalanced by a larger consumption of spirits and beer. That this is so may be gathered from the revenue return which shows an increase of the excise on spirits for the year of 10,000,000 fr. (400,000*l.*), and on beer of 1,000,000 fr. (40,000*l.*), and an increase of import of beer may also be observed. Cider production fell off even more than the make of wine. The yield fell from 9,767,181 hectolitres (214,877,982 imperial gallons) in 1888, to 3,701,342 hectolitres (81,429,524 imperial gallons) in 1889.

There are as yet no statistics available of the quantities manufactured in France during 1889, of woollen and cotton and silk tissues. But the increase in demand for raw materials which we shall have to notice, coupled with an increase in prices, the ten-

dency of wages to rise, and the expansion of the French export trade, are fair testimony to progress.

In 1887 Lyons and environs with 70,000 hand looms, and 20,000 mechanical looms, is officially stated to have produced silks to the value of 377,150,000 fr. (15,086,000*l.*) In 1888 the value was 383,350,000 fr. (15,334,000). For 1889 we have no value as yet; but there was probably an increase, which is manifested in the returns of the silk testing house, where 5,900,000 kilos. were tested in 1889, as against 5,183,520 kilos. in 1888. Prices of raw silk advanced during the year for Cevennes from 57 fr. to 65 fr.; Italian, from 53 fr. to 62 fr.; Japanese, from 51 fr. to 60 fr. Imports of cocoons were larger from China, smaller from other countries during the year; and they were almost reduced to nothing from Italy.

Raw silk only came in from Italy to the amount of 600,000 kilos.; 4,000,000 kilos. entered from China and Japan. Thrown silk from Italy rose to 265,000 kilos., or double the quantity sent from all other countries. Floss silk was 1,500,000 kilos. from Italy, and 5,000,000 from China, Japan, and other countries.

Wool in strong demand in a market where prices steadily rose between 8 and 10 per cent., during the year, gave manifest indications of the extent of the depletion of stocks, which notoriously occurred in 1888, as well as of a large demand caused by an extension of the markets for woollens during 1889. Deducting exports from imports we shall find that the quantity of wool entered for consumption in France was 159,000,000 kilos. in 1889, as against 147,400,000 kilos. in 1888; and we shall presently see that French business in woollens improved greatly. It had been noted that the imports of wool into France fell off $3\frac{1}{2}$ per cent. in 1888, as compared with 1887; in 1889 they rose 10 per cent. The stocks of silk, cotton, and jute had been allowed to drop 23, 20, and 13 per cent. in 1888. The increase in 1889 was almost as marked as the decrease in 1888.

As regards cotton, heavier demand also produced an advance in prices of 10 to 12 per cent., followed by a reaction towards the close of the year. Deducting exports from imports there remained for consumption in 1889 123,000 tons of cotton, as compared with 94,000 tons consumed in 1888. Jute imports rose from 1,968,956 kilos. in 1888 to 2,802,836 kilos. in 1889; and whereas 2,000,000 kilos. were exported in the year before last only 746,000 kilos. left the country in 1889.

These favourable symptoms were partly counterbalanced by a heavy decrease in the import of hemp, and a fall in the import of flax, from 77,000,000 kilos. in 1888, to 65,000,000 kilos. in 1889, unaccompanied by any serious change in the quantities exported.

Amongst raw materials of which the imports were larger in 1889 than in 1888 we should note as in strong progress:—

Other raw materials.							Fr.
					by		
	Skins and peltry	..	..	..	..	by	28,000,000
	Horsehair	..	..	..	..	"	2,000,000
	Dress feathers	..	..	..	..	"	3,000,000
	Rags	..	..	..	..	"	3,500,000
	Guano and other fertilizers	..	..	..	..	"	6,000,000
	Exotic gums	..	..	..	..	"	2,000,000
	Lead	..	..	..	..	"	3,000,000
	Petroleum	..	..	..	..	"	2,000,000
	Ores	..	..	..	..	"	2,000,000

At the same time, in other imports, a falling off was apparent for the following goods, viz:—

							Fr.
					by		
	Oilseeds	..	..	..	..	by	2,500,000
	Oils (vegetable)	..	..	..	..	"	4,000,000
	Tobacco leaf	..	..	..	..	"	2,000,000
	Dye woods	..	..	..	..	"	3,000,000
	Coal and coke	..	..	..	..	"	6,000,000
	Copper	..	..	..	..	"	57,000,000
	Tin	..	..	..	..	"	3,000,000
	Indigo	..	..	..	..	"	4,000,000
							81,500,000

The decrease in copper is accounted for by the collapse of the copper trust.

Taking into account the increased imports of wool, silk, jute, and cotton, viz:—

							Fr.
	Wool	..	..	..	..	..	36,856,000
	Silk	..	..	..	..	..	77,675,000
	Jute	..	..	..	..	..	4,000,000
	Cotton	..	..	..	..	..	29,000,000
							147,531,000

The balance shows a more than usually abundant supply of raw materials to French manufactures, and affords evidence of a cessation of depression.

Coal trade. A diminution will have been noticed in the import of coals into France. The reduction for 1889 is 417,263 tons; that is from 8,217,511 tons in 1888, to 7,800,248 tons in 1889. But this change is a proof, that in spite of a rise in the average price at the pit's mouth in France, the demand increased, whilst proportioned to the demand, was the elasticity of the French supply.

The returns for 1888-89, tell us that the quantities of coal and anthracite raised in all the French departments in 1889 was 24,139,406 tons, as compared with 22,172,029 tons in 1888, the bulk of the increase being in the Pas-de-Calais and Nord, whilst the southern collieries remained much at their old figure.

Iron and steel trade. Contemporary with this expansion of the coal trade is the activity of the French blast furnaces which yielded 1,772,480 tons of pig in 1889, as against 1,683,349 tons in 1888. Manufactured iron fell during the same period, from 816,973 tons to 793,358 tons, whilst on the other hand, the yield of manufactured steel rose from 517,294 tons to 529,021 tons in the same period. The quantity of manufactured iron imported into France is always small. In 1889 it was smaller than usual, viz:—about 12,000

tons against 19,000 tons in 1888. The rapid advance of quotations which was observed in autumn on the English and Scotch markets, and had its full effect here, may partly explain the phenomena. Yet it would seem that some large transactions took place in pig between England and France, though much of the import did not go into consumption, but was probably exported.

It is not quite certain that the import of colonial and other produce into any country is evidence of prosperity or depression. Foreign corn and flour only cost France 372,000,000 fr. (14,880,000*l.*) in 1889, whereas in 1888, the cost was 475,000,000 fr. (19,000,000*l.*). The agriculturists consider this diminution to be due in part to protective duties, but it is in part also due to a beneficent harvest. Produce, home and colonial.

The loss to the exchequer from decrease of duty is 6,457,000 fr. (258,280*l.*). The import of rice, which fell off from 25,000,000 fr. (1,000,000*l.*) to 20,000,000 fr. (800,000*l.*), may be looked at in another light. Rice is burdened with no duty at present.

Again a decrease of 3,000,000 fr. (120,000*l.*) in the import of cattle, viz.: from 78,000,000 fr. (3,120,000*l.*) in 1888, to 75,000,000 fr. (3,000,000*l.*) in 1889, is also considered favourable by French agriculturists; the loss to the revenue is nearly 2,000,000 fr. (80,000*l.*). The contrary opinion holds good as to the imports of fresh and salt meat, which increased from 34,000,000 to 45,000,000 fr. (1,360,000*l.* to 1,800,000*l.*). Cattle. Meat.

France can scarcely be congratulated on the reduction in the consumption of coffee, from 132,000,000 fr. to 127,000,000 fr. (5,280,000*l.* to 5,080,000*l.*), of greases from 39,000,000 fr. to 32,000,000 fr. (1,560,000*l.* to 1,280,000*l.*), of palm oil from 18,000,000 fr. to 15,000,000 fr., on cotton oil from 6,000,000 fr. to 5,000,000 fr. (240,000*l.* to 200,000*l.*), of fish and cod from 47,000,000 fr. to 43,000,000 fr. (1,880,000*l.* to 1,720,000*l.*). But there are compensations on olive oil, which was better by 3,000,000 fr., on petroleum, and other mineral oils, better by 1,500,000 fr., and on sulphur better by 1,000,000 fr. Coffee. Grease and oils.

Excepting for potash, soda, nitrates, and coal-tar dyes, shrink- ing occurred in imports of most chemicals, while exports on the whole expanded excepting for one or two articles. Imports, taken at the same value for the two years, were worth 90,166,000 fr. (3,606,640*l.*) in 1889, as against 84,533,000 fr. (3,381,320*l.*) in 1888. Exports were 52,000,000 fr. (1,080,000*l.*) in 1889, as compared with 47,000,000 fr. (1,880,000*l.*) in 1888. Increased imports were:— Chemicals.

Articles.		1889.	1888.
Arsenical acid	1,000 Kilos.	735	550
Gallic acid.	"	833	412
Oxide of lead	"	2,717	2,617
Potash and carbonate of potash .	"	3,227	1,065
Nitrate of soda	"	177,624	158,530
Sulphate of copper	"	13,524	9,283
Aniline and phenic acid	"	9,371	6,985

The chief decreases were :—

Articles.					1889.	1888.
Stearic acid	..	..	..	1,000 Kilos.	1,067	1,486
Sulphuric acid	..	..	..	"	6,758	7,624
Ammonia ..	..	..	..	"	157	519
Beetroot salt	..	..	..	"	843	1,970
Caustic soda	..	..	..	"	3,291	4,522
Soda (refined)	..	..	..	"	412	878
Salt of ammonia	..	..	..	"	9,866	11,182
Alum ..	..	..	..	"	2,585	3,185
Tartrates ..	..	..	..	"	1,269	1,744

Exports of sulphuric acid fell 6,000,000 kilos., sulphate of soda 8,000,000 kilos. But the following were more largely exported in 1889 than in 1888, viz. :—

	Kilos.
Gallic acid	4,000,000
Oleic acid	4,000,000
Potash	2,000,000
Soda	3,000,000
Glycerine	1,000,000
Tartrates	1,000,000
Undenominated	1,000,000

Indigo.

There is a decrease in the imports of indigo of 390,000 kilos., valued at nearly 5,000,000 fr., which partially compensates the increases in the imports of coal tar produce, and alizarine and other coal tar dyes.

Silk manu-
factures.

The large increase of raw materials for manufacturing silk, which has been registered in a previous page, may be stated in quantity at 15,000,000 kilos. in 1889, as against 11,500,000 kilos. in 1888. It occurred simultaneously with a more abundant supply, chiefly from Switzerland, of foreign plain silks, and mixed silks, gauzes, and crêpes, besides net and ribbons. Plain silk exports merely held their own at the usual figure of 1,250,000 kilos. But there was a brisk foreign demand for mixed silks and blonde, of which the quantities dealt in were 4,563,783 kilos. in 1889, as compared with 3,244,942 kilos. in 1888. The total weight of exported silks for the two years was :—

	Kilos.
1888	223,000,000
1889	247,000,000

The demand for plain silks, which had been shrinking in Great Britain and Switzerland, made progress in Germany, Turkey, and the United States. What England took most of was mixed, plain, and *faconné* silks and crêpe and gauze and velvet.

Woollens.

But large as the business in silks is now in France, it is not the largest business of Frenchmen. Woollens were exported in 1889 to the amount of 335,000,000 fr., as against 223,000,000 fr. (13,400,000*l.*, as against 8,920,000*l.*) in 1888. The main increase

was realised in broadcloth and mixed woollens; whilst there was a falling-off in carpets, merinos, and stuffs. The importance of some of the figures will be seen from the details of certain exports.

Articles.		1889.	1888.
Merinos	Kilos. ..	2,702,159	2,843,927
Cloths and casimirs	" ..	11,516,094	10,776,384
Woollen stuffs	" ..	10,433,587	11,150,536
Hosiery	" ..	1,071,911	906,328
Mixed woollens	" ..	2,792,264	2,310,710
Total		28,519,015	27,987,885

England alone took 12,000,000 kilos., or about half of all that France exported.

France, on her part, received but 63,000,000 frs. worth of woollens in 1889, as against 65,000,000 fr. in 1888, her chief demands being:—

Articles.		1889.	1888.
Cloths and casimirs	Kilos. ..	2,000,038	2,617,604
Stuffs	" ..	839,336	695,506
Mixed woollens	" ..	3,108,552	2,746,705
Carpets	" ..	760,278	728,301
Total		6,708,204	6,788,116

England's share in woollen imports into France was as follows:—

Articles.		1889.	1888.
Carpets (Persian)	Kilos. ..	21,861	19,129
" other	" ..	572,922	543,122
Cloths, casimirs, and others	" ..	1,548,882	2,120,366
Stuffs	" ..	483,977	377,597
Mixed woollens	" ..	2,950,424	2,567,102
Total		5,578,066	5,627,346

In woollen yarns French imports were but 11,000,000 fr. in 1889, or 3,000,000 fr. less than in 1888. Exports on the contrary ^{woollen yarns.} increased in the same period from 37,000,000 fr. to 50,000,000 fr.; and out of a total weight of 2,050,000 kilos. of yarns England alone took in 1889 1,700,000 kilos. For the total of 7,870,000 kilos. of yarns exported from France, Belgium alone was a customer for upwards of 2,500,000 kilos. These figures mark a great stride in the business of French spinners, who only exported 5,000,000 kilos. of woollen yarn in 1888.

Linen yarns from abroad were less in demand in France in 1889 than in 1888, the difference in money being as 6,500,000 fr. to 8,000,000 fr. Simultaneously the foreign demand for French linen yarns rose from 9,800,000 fr. to 11,240,000 fr.

For cotton yarn the picture is reversed, the imports rose from 25,700,000 fr. in 1888 to 28,100,000 fr. in 1889; the increase being chiefly to the advantage of Belgium, which brought up its figure of 2,645,000 kilos. for 1888 to 4,163,189 for 1889. English and Swiss business remained stationary. French exports of cotton yarn were as usual comparatively insignificant.

In jutes and linens, French exchanges are limited. We should note, however, an improvement in imports from 7,000,000 fr. in 1888 to 8,000,000 fr. in 1889. A proportional increase in the exports also took place, as shown by the values of 12,000,000 fr. in 1888, and 14,000,000 fr. in 1889.

Cotton trade.

The French cotton trade is admittedly hampered by costs of production which prevent manufacturers from competing with success on neutral markets. At the same time a very high tariff keeps foreign cottons out of France with much efficacy. Many causes are put forward to explain the state of the French cotton cloth market, but it is admitted by the very best authorities that a gradual increase of mechanical looms has barely counterbalanced the loss of handlooms;—that for years there has been but little advance in the productive force of the weaving industry and that home consumption has not very materially increased.

Statistics of
spindles and
looms.

According to the latest statistics, which are now six years old, the number of spindles in France remained at about 5,000,000 between 1879 and 1883. The number of hand looms fell from 49,000 to 37,515 in the same interval, whilst the number of mechanical looms only rose from 63,348 to 73,665. There has been a transformation so far that the French have steadily discountenanced and even impeded the purchase of foreign goods, and preferred at times, on patriotic or other grounds, to extend their dealings in home manufactures. Under these impulses the import trade has fallen away, and an increased business has been done for exportation; and this tendency has of late been constantly maintained.

Cotton
imports and
exports.

If we look at the imports of cotton stuffs into France for a series of years, we observe that their gradual shrinking from 72,000,000 fr. and 75,000,000 fr. in 1881 and 1883, to 40,000,000 fr. in 1889 (2,880,000*l.* and 3,000,000*l.* to 1,600,000*l.*) has been simultaneous with a gradual expansion of exports from 88,000,000 fr. to 117,000,000 fr. in 1887, and 113,000,000 fr. in 1889 (3,520,000*l.* to 4,680,000*l.* and 4,520,000*l.*). Improved machinery has doubtless enabled French makers to fill the gap created in France by the artificial diminution of the foreign supply. It has probably enabled them to dispose of the surplus in larger quantities and at cheaper rates abroad than at home. Yet the results of this business are nowhere considered encouraging.

Statistics disclose a further reduction in imports from 6,800,000 kilos. in 1888 to 6,500,000 kilos. in 1889. They disclose

at the same time an export of 22,830,000 kilos. in 1889, as against 22,550,000 kilos. in 1888. The figures in detail are, in million kilos., as follows :—

COTTON STUFFS.

Articles.	Imports.		Exports.	
	1888.	1889.	1889.	1888.
Plain grey	1.20	1.19	7.61	7.07
Dyed	0.59	0.62	5.11	5.39
Printed	1.42	1.41	1.71	1.87
Oilcloth.. ..	1.65	1.81	0.34	0.14
Muslins	0.009	0.04	0.16	0.09
Velvets	0.17	0.19	0.04	0.07
Cords and moleskins ..	0.32	0.43	0.13	0.38
Worked and damask ..	0.31	0.30	0.09	0.07
Counterpanes	..	..	0.24	0.25
Embroidery	0.17	0.10	0.01	0.01
Gauze	0.002	0.001	..	..
Lace and guipure ..	0.07	0.08	1.66	2.28
Net	0.03	0.03	0.22	0.20
Hosiery.. ..	0.16	0.17	8.13	2.84
Trimmings	0.14	0.14	0.82	0.62
Mixed cottons	0.26	0.27	1.36	1.10
Other	0.06	0.02	0.20	0.17
Total	6.56	6.80	22.83	22.55

Plain cloth, prints, faconnés, and embroidery alone show better in the import column for 1889. The export column displays improvement for plain cloth, oilcloth, muslins, net, hosiery, trimmings, and mixed stuffs. There is a falling-off in prints, velvets, cords, and moleskins, and lace and guipure.

The year which has just expired was less favourable than Pottery. 1888 for the import of pottery, porcelain, and glass. But the reduction was not very material. In exports pottery and porce- Porcelain. lain established an advance from 11,250,000 fr. to 12,500,000 fr.

The supply of foreign paper and preparations of paper went Paper. up from 31,000,000 fr. to 36,000,000 fr. Exports also increased in a small measure. An improvement in prepared skins was Skins. realised for import, as well as for export. The latter rose in value from 92,000,000 fr. to 107,000,000 fr.; the former from 30,000,000 to 31,500,000 fr.

Importers of machines and machinery disposed of 44,000,000 Machinery. fr. worth of goods in 1889, an advance of 7,000,000 fr. on the previous year. Exporters in the same way sold for 42,000,000 fr. instead of 35,000,000 fr. 6,000,000 fr. was the addition to the usual export business in jewellery and gold and silver ware; but Jewellery. importers reaped a similar harvest, the increase being from 9,000,000 fr. in 1888, to 15,500,000 fr. in 1889.

For tools and metal wares, the market was profitable to Tools and metal goods. importers, as well as to exporters, viz. :—

			Imports.	Exports.
			Francs.	Francs.
1889	..	..	23,500,000	92,000,000
1888	..	..	23,000,000	71,000,000

Smallware.

The French makers of small wares, brush wares, and button wares reaped a good harvest. They sold goods to the large amount of 106,000,000 fr. in 1889, as against 97,000,000 fr. in 1888.

Artificial flowers and modes.

The Paris manufacture of artificial flowers and mode wares also raised their sales abroad from 29,000,000 fr. to 36,000,000 fr.

Body linen.

The trade in slops and made-up body linen for export increased from 35,000,000 fr. to 42,000,000 fr.

Dress clothes.

Articles of dress for men and women were favoured equally, and yielded 44,000,000 fr. instead of 41,000,000 fr.

In many of these classes of goods the exports were not as high as those of 1880 and 1881, but the depression of the last years was found to have passed away.

Sugar trade.

A few words in conclusion on the trade and consumption of sugar. The quantity of raw sugar entered for consumption in 1888 was 429,899,914 kilos., the total supply 578,811,088 kilos. In 1889 the figures were 392,547,338 kilos. and 614,041,914 kilos. respectively.

The year which has just expired was distinguished from 1888 by a larger production and a greatly increased export of home produce, and a decrease in the imports of foreign and colonial sugar. The home production has already been given for the seasons 1887-88, and 1888-89. For the administrative year it was, in 1889, 455,787,000 kilos.; in 1888, 369,191,000 kilos. The exports of 1889 were 201,586,000 kilos.; those of 1888, 146,784,000 kilos.

Imports declined as follows :—

			1889.	1888.
			Kilos.	Kilos.
Colonial ..	..	..	108,183,900	125,954,600
Foreign cane ..	..	..	48,044,073	81,884,552
Foreign beet ..	..	..	Nil.	24,000
Vergeoises ..	..	..	176,000	241,000
Refined ..	..	..	1,849,000	1,513,000
Molasses..	..	..	86,299,000	123,219,000

The loss in duty has already been stated at 16,700,000 fr. The Government are credited with the intention to raise additional taxation on duty-free excess-yields of home grown beet sugar.

Navigation.

The statistics of navigation, so far as French vessels are considered, show no improvement in 1889 upon 1888 as regards

tonnage, though a slight increase in the number of ships is noticeable. The figures are:—

ENTERING.

1889.		1888.	
Ships.	Tonnage.	Ships.	Tonnage.
8,464	4,661,433	8,302	4,788,039

The statistics of foreign ships are still less favourable, viz.:—

CLEARING.

1889.		1888.	
Ships.	Tonnage.	Ships.	Tonnage.
18,298	8,883,926	19,874	8,749,695

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1890.
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Nº. 656.
DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1889
ON THE
TRADE OF THE CONSULAR DISTRICT OF
CHERBOURG.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 473.

*Presented to both Houses of Parliament by Command of Her Majesty,
MARCH, 1890.*

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FRANCE.

CHERBOURG.

Consul Vereker to the Marquis of Salisbury.

My Lord, Cherbourg, February 26, 1890.

I HAVE the honour to transmit herewith a Report upon the Trade and Commerce of the Departments of La Manche, Ile-et-Vilaine, and Sarthe for the year 1889.

I have, &c.
(Signed) H. P. VEREKER.

Report on the Trade and Commerce of the Departments of La Manche, Ile-et-Vilaine, and Sarthe for the Year 1889.

DEPARTMENT OF LA MANCHE (CHERBOURG).

RETURN of all Shipping engaged in Foreign Trade at the Port of Cherbourg in the Year 1889.

ENTERED.

Nationality.	With Cargoes.		In Ballast.		Total.		
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British ...	231	106,546	151	25,135	482	131,681	Shipping. Cherbourg.
French ..	34	3,440	11	1,268	45	4,708	
Danish ...	1	958	...	...	1	958	
German ...	17	34,268	...	...	17	34,268	
Norwegian ...	13	5,687	1	444	14	6,131	
Russian ...	11	4,196	...	...	11	4,196	
Swedish ...	6	3,178	...	...	6	3,178	
Total, 1889 ...	413	158,273	163	26,847	576	185,120	
" 1888 ...	466	198,417	126	25,040	592	223,457	

CLEARED.

Shipping.
Cherbourg.

Nationality.	With Cargoes.		In Ballast.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	394	111,007	83	20,179	477	131,186
French ..	9	817	21	6,939	30	7,756
Danish ...	...	...	1	958	1	958
German ...	17	34,268	...	...	17	34,268
Norwegian ...	1	444	13	5,687	14	6,131
Russian ...	...	...	11	4,196	11	4,196
Swedish ...	1	731	5	2,447	6	3,178
Total, 1889 ...	422	147,267	134	40,406	556	187,673
" 1888 ...	429	185,258	186	48,297	615	233,555

A gradual but steady increase in the number of steamers as compared with sailing ships trading with this port is noticeable in the past and previous years. This is especially the case as regards British vessels, and it has the effect of raising the average tonnage of the ships employed, so that a reduction in the number of vessels engaged is occasionally concomitant with an increase in the tonnage employed.

Shipping.
Cherbourg.

The great preponderance of British shipping in this trade has been fully maintained in the year 1889; and although in some points the above return does not compare favourably with 1888, yet, as this is due to the falling-off of the German Transatlantic steamers visiting the port, the normal shipping trade is shown to be remarkably steady.

Coasting
trade. Cher-
bourg.

The coasting trade in 1889 was, as usual, carried on wholly by French vessels. There were employed therein:—Inwards, 567 vessels, of 50,400 tons, and 2,909 in crews; outwards, 581 vessels, of 47,013 tons, and 3,088 in crews. These figures indicate the following augmentations over 1888:—Inwards, 29 vessels, 9,031 tons, 161 in crews; outwards, 40 vessels, 16,221 tons, and 458 in crews.

RETURN of Principal Articles of Export at Cherbourg in the Year 1889.

Exports.
Cherbourg.

Articles.	Quantities in Tons.	
	1889.	1888.
Butter.. ..	12,720	10,294
Cattle and sheep	2	16
Coals and coke	2,452	1,099
Eggs	939	883
Fowls	40	..
Meat, fresh	164	..
Potatoes	2,865	2,455
Rags	196	150
Stone, macadamised	858	..
Tar	344	235
Vegetables	1,409	727
Wine (in cask and bottle)	22	22
Other articles	632	1,089

The execution of the law intended to prevent the adulteration Butter of butter is carefully attended to at this port, and increases the confidence of consumers, as is evidenced by the additional export of over 2,000 tons.

The exports of coke to England are larger, as the price here Coke. admits of its being sent profitably, but the stock is diminishing.

The shipment of fresh meat is somewhat checked by the high Fresh meat. prices ruling at present, the retail prices of ordinary joints of beef and mutton reaching over 1s. per lb. More attention is, however, being paid to this line of business, and the advantages to be derived therefrom are publicly urged.

There has been for many years a trade from this port in Stone. supplying northern French ports with stone for paving and building, but the shipment of macadamised stone, which is mostly forwarded to Southampton, is a new venture which may have a large development. There is an unlimited supply of stone (quartz) close to this town. It is largely used for making paving stones, which are only inferior to granite, and lately steam machinery has been erected on the quarries to break the stone into macadam and gravel. Even now it is delivered in England so as to cover the disbursements with a profit; but if the cartage from the quarries to the quay, about $1\frac{1}{2}$ miles, were economised by a tramway, the stone would stand at a much cheaper rate, and in that case its exportation may become important.

RETURN of Principal Articles of Import at Cherbourg in the Year Imports.
1889. Cherbourg.

Articles.	Quantities in Tons.	
	1889.	1888.
Boats	1,031	1,295
Bricks and tiles	9	88
Bran	..	753
Coals and coke	33,096	36,887
Fish, fresh	9	10
Flour, wheaten	275	60
Lobsters, fresh and preserved	36	57
Manure, guano and phosphate	2,666	2,806
Oak staves	263	..
Wheat.. .. .	811	268
Wine	193	743
Wood, sawn and rough	20,383	20,013
Other articles.. .. .	3,023	396

The retail price of coals has risen from 34 fr. to 42 fr. per ton, Coals. and the tendency is still upwards. Patent fuel and other combustibles have risen in proportion.

Freights have steadily improved through the year, and the Freights. rates for coals from the Tyne may be taken to have moved from 5s. 3d. to 8s. 3d. per ton.

The excavations to deepen the commercial tidal port have Commercial
(814) A 3 port.

been completed, so far as it is at present proposed to proceed. They have been to the depth of 4 to 6 ft., mostly by the removal of rock; the deepest part is in the central channel leading to the floating basin; the east side of the port has not been excavated near the quays, as these rest on a weak and sandy foundation. To obviate the inconvenience thus caused, which prevents steamers lying alongside the quay at low water, it has been determined to erect a wooden landing-stage, projecting 12 ft. from the quay, alongside of which steamers may load or discharge in almost any state of the tide. This work has been adjudicated for 48,000 fr., and will be at once proceeded with: it will much facilitate communications with the United Kingdom, and will go far to obviate the disadvantages of the port being a tidal one.

Breakwaters.

The construction of the breakwaters to close in the roads of Cherbourg has been conceded to two Paris firms. It is intended to form a breakwater from the Fort des Flamands, on the east side, to the island of Pélée, and another on the west side, from the fort of Querqueville to the island of Chavaignac: both those breakwaters will have an opening in the centre to admit of the passage of boats. Likewise it is proposed to diminish considerably the widths of the eastern and western entrances to the roads from seawards. The cost of the works on the eastern side is estimated to be 81,880*l.*, and on the western side 319,040*l.* These works would render the roads quite safe and sheltered; but it is to be hoped, for the sake of commerce, that the project partly to close the entrances may not be persevered in, for the entrances are none too large for present requirements in view of the strong winds and currents which prevail, and further restrictions would injure Cherbourg as a trading centre, and lessen, if not destroy, the value of the port as one of refuge.

Congo
steamers.

A new line of French steamers has been established to run from Havre and Cherbourg to Senegal and the Congo. They average about 3,000 tons, and are well fitted for passengers. At present they make the voyage each alternate month.

Charter-
parties.

In consequence of the large number of steamers in this trade bringing coals, it has been usual for shipbrokers to do the work of those vessels for a lump sum instead of charging their authorised fees per ton of cargo delivered, and clauses were often inserted in charter-parties conditioning that the brokerage was not to exceed a fixed sum. This system was mutually advantageous, for the expenses of the shipowners were limited, and the work cast upon the brokers by such steamers, which usually remain in port but a few hours, was much less than would have been caused to them by a number of sailing ships carrying in the aggregate the same amount of coals. The remuneration payable was generally fixed according to the tonnage of the vessel chartered; but as some of those steamers are so constructed as to carry cargoes of more than double their register tonnage, the shipbrokers considered that they were losing too much by receiving a fixed sum instead of their authorised brokerage per ton delivered; consequently, unless they have been parties thereto, they repudiate any clause in the

charter-party having the effect of reducing their brokerage. Ship-owners, therefore, who wish to limit the amount of brokerage payable should either obtain the consent of the broker beforehand, or so word the clause that the merchant should be responsible for the excess, if any, over the amount contemplated.

La Haye du Puits to Carteret.—This railway was opened for ^{Railway.} passenger traffic on July 7 last. It connects the bathing resort of Carteret with Cherbourg on one side, and Contances and Granville on the other. During the summer months small steamers run between Carteret and Gorey, Jersey.

DEPARTMENT OF ILLE-ET-VILAINE (ST. MALO).

Vice-Consul the Hon. E. Henniker Major conveys the following information regarding the trade of the ports of St. Malo and St. Servan in the year 1889.

RETURN of Shipping at the Ports of St. Malo and St. Servan during the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
French ...	431	29,643	41	2,513	472	33,156
British ...	172	11,783	623	177,808	795	189,596
Other nations ...	13	3,979	2	1,108	15	5,082
Total ...	616	45,405	666	182,419	1,282	227,824

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
French ...	443	32,075	41	2,513	484	35,588
British ...	177	17,033	598	125,804	775	142,837
Other nations ...	15	4,723	2	1,103	17	5,826
Total ...	635	53,831	641	130,420	1,276	184,251

Shipping,
St. Malo.

EXPORTS from St. Malo and St. Servan during the Year 1889.

Exports. St. Malo.	Articles.	St. Malo.		St. Servan.	
		1889.	1888.	1889.	1888.
		Tons.	Tons.	Tons.	Tons.
	Barley	10,912	6,849	245	90
	Buckwheat	11,147	9,021	..	..
	Butter	7,079	4,491	5	7
	Eggs	4,243	4,047	..	..
	Potatoes	8,606	8,923	368	676
	Fruit	1,117	3,082	..	115

IMPORTS to St. Malo and St. Servan for 1889.

Imports. St. Malo.	Articles.	St. Malo.		St. Servan.	
		1889.	1888.	1889.	1888.
		Tons.	Tons.	Tons.	Tons.
	Coal	176,887	155,624	15,396	14,929
	Iron	2,185	196	..	..
	Pitch	5,831	3,164	..	..
	Timber and wood	15,759	12,001	10,780	4,805

DEPARTMENT OF SARTHE (LE MANS).

Mr. Vice-Consul de Veulle reports as follows on the trade of Le Mans in the year 1889 :—

RETURN of Principal Articles of Export from Le Mans during the Year 1889.

Exports to Le Mans.	Articles.		1889.		1888.	
			Quantity.	Value.	Quantity.	Value.
				£		£
	Grain	Quarters	50,000	77,500	35,000	45,000
	Seed	Sacks ...	14,000	32,800	12,000	28,000
	Fruit	...	...	900	...	9,000
	Walnuts	Sacks ...	10,500	6,300	...	...
	Eggs	Doz. ...	198,000	9,900	236,000	11,800
	Poultry... .. .	...	...	32,400	...	31,000
	Other articles... .. .	...	...	8,000	...	8,000
	Total	...	...	167,800	...	132,800

RETURN of Principal Articles of Import to Le Mans during the
Year 1889.

Articles.	1889.		1888.		Imports to Le Mans.
	Quantity.	Value.	Quantity.	Value.	
	Tons.	£	Tons.	£	
Coal	36,000	46,800	34,000	40,800	
Metals	..	13,000	..	12,000	
Other articles	..	11,000	..	11,000	
Total	..	70,800	..	63,800	

The Vice-Consul adds :—

The decrease in the export of eggs was caused by the Paris Dairy Exhibition, during which prices in Paris were higher than in the English markets, and induced merchants to favour the former market.

Poultry (geese) is on the increase, though slightly. Farmers find it in every way profitable to breed them; the low price of grain, especially buckwheat, being in their favour. The breeding of geese is profitable on small farms, such as this department is mostly composed of.

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AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1889
ON THE
TRADE, &c., OF SAIGON.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 477.

*Presented to both Houses of Parliament by Command of Her Majesty,
MARCH, 1890.*

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580. Warsaw	½d.	642. Cherbourg	½d.
581. Teneriffe	1d.	643. New York	1d.
582. Tangier	2d.	644. Patras	1d.
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586. Cagliari	1d.	648. Baltimore	1½d.
587. Smyrna	½d.	649. New Orleans	2d.
588. Mannheim	1d.	650. New Orleans	1d.
589. Nagasaki	1d.	651. Samos	½d.
590. Hakodate	1d.	652. Buda-Pesth	1½d.
591. Bushire	1d.	653. Tripoli	½d.
592. Chinkiang	½d.	654. Buenos Ayres	½d.
593. Pakhoi	1d.	655. Paris	1d.
594. Hiogo	1½d.	656. Cherbourg	1d.
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No. 659.

Reference to previous Report, Annual Series No. 477.

FRANCE.

SAIGON.

Consul Tremlett to the Marquis of Salisbury.

My Lord, Saigon, January 31, 1890.
 I HAVE the honour to enclose my Report upon the Trade,
 Commerce, and Navigation of Saigon for the year 1889.
 I have, &c.
 (Signed) CHAS. F. TREMLETT.

*Report on the Trade, Commerce, and Navigation of Saigon for
 the Year 1889.*

The apprehensions expressed in my last report that the crop then about to be harvested would prove a short one were more than realised, and much suffering among the natives resulted therefrom. This is not so apparent near Saigon, where a large number of people find employment, more or less well paid; but even at a short distance from the capital the poorer classes, and they constitute a vast majority, have long been offering their labour for food.

As for the crop now ripening, sanguine hopes are entertained that it will be at least an average one; but the last months, which should have been quite dry, have brought us too much wet weather, and the early rice is compromised to a considerable extent.

Rice.—The statistics given below show a total of 4,691,500 piculs, or 280,000 tons, being less than the export of 1888 by 220,000 tons, or nearly 50 per cent. The average price for cargo may be put at 1 dol. 72 c. per picul, equal to 6s. 5d. per cwt.—Exports.—and the total values may be summed up as follows:—

	Quantity.	At	Value.	
			Currency.	Sterling.
	Piculs.	Dol. c.	Dol.	£
Cargo ..	2,784,000	1 72	4,788,480	..
White ..	973,000	2 30	2,237,900	..
Paddy ..	934,500	1 25	1,168,125	..
Total ..	4,691,500	..	8,194,505	1,442,000

STATEMENT of Rice Export for 1889.

Countries.	Ports.	Piculs.	Totals.
China ..	Hong Kong.. ..	2,727,600	2,756,700
	Swatow	29,100	
Philippines	Manila	523,800	863,200
	Iloilo	229,000	
	Cebu	110,400	
Tonkin	Haiphong	..	800
Straits	Singapore	..	673,100
Siam	Bangkok	..	6,000
Java	Somalaya	..	64,600
British colony ..	Victoria	..	16,800
Réunion	Bonwon	..	30,900
Europe	F.O.	..	279,400
		..	4,691,500

Other exports have been—

	Piculs.
Fish	225,474
Hides	13,214
Cotton	24,035
Cardamom	28
Silk	2,045
Wood	48,775
Isinglass	324
Coprah	5,418
Pepper	7,020
Cocoa-nut oil ..	1,186
Salt	7,900
Horns	3,182

This year has seen the opening of a direct trade with Japan in cotton, and it bids fair to attain considerable porportion, and will most probably stimulate the cultivation of this product.

Exchange.

Rates have ranged as under:—

London demand, bank bills	3s. to 3s. 2½d.
„ documents, three months sight	3s. 1d. to 3s. 8½d.
Singapore demand, bank bills .. ½ p. c. discount to ¾ p. c. premium	
„ documents, 30 d. .. ¾ p. c. discount to 1½ p. c. discount	
Hong Kong demand, bank bills .. ¾ p. c. discount to 1 p. c. premium	
„ documents, 15 d. .. 1½ p. c. discount to 2 p. c. discount	
Manila „ 30 d.	par. to 7 p. c. premium

Shipping and navigation.

Clearances numbered 239, aggregating 247,996 tons net register, of which British shipping appears, in tonnage, rather more than one-half, followed very closely by German tonnage.

The Messageries Maritime steamers, the Bangkok boat, and the hired transports, none of them contributing materially to the trade of the port, will be found at foot: they swell the total amount of shipping to 381 vessels, of 460,821 tons. This is a notable falling-off from the figures of 1888, and must be attributed partly to the inferior rice crop, and partly to the effect of the heavy duties levied upon foreign imports, which French production or manufacture do not replace.

STATEMENT of British Shipping.

Class.			Number.	Tonnage.	Crews.
Steam	..	..	105	120,918	4,121
Sail	..	..	9	11,749	182
Total	..	..	114	132,667	..

CLASSED in Reference to Nationalities.

Flag.	Steam.	Tons.	Sail.	Tons.	Total.	Tons.
British	105	120,918	9	11,749	114	132,667
Danish	1	419	..	..	1	419
French	7	3,437	..	..	7	3,437
German	111	105,831	1	896	112	106,727
Norwegian	3	3,804	..	..	3	3,804
Spanish	2	942	..	..	2	942
Mess. Mar.	229	235,351	10	12,645	239	247,996
Chartered transports	117	177,030	..	..	117	177,030
Bangkok steamers	10	29,480	..	..	10	29,480
	15	6,315	..	..	15	6,315
Total	371	448,176	10	12,645	381	460,821

RATES of Freight during the Year.

Hong Kong	..	..	..	..	4 to 13 cents. per picul.
Java	..	..	..	..	24 to 26 " "
Philippines	..	..	..	..	19 to 30 " "
Singapore	..	..	..	..	6 to 15 " "

Nothing new has transpired regarding the proposed moorings.

Pilotage is carried on upon much the same basis as before. No Pilotage. station has yet been established at Cape St. James, and pilots live on shore, getting on board vessels after their arrival in the bay.

Nothing can be particularised until statistics are made up, Imports. which will not be for some month. The tariff continues to bear hardly upon foreign goods, particularly piece goods, which still remain in favour with the natives, upon whom fall the burden of duty. French manufactures offer little relief, not being suitable either in quality or price: the tax upon foreign tissues was increased upon July 1, 1889.

Nothing more has been heard of the projected loan; it has, Loan. perhaps, fallen into oblivion, like so many others. It is certain, however, that relief of some kind must be found for the diminished budget.

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FRANCE.

REPORT FOR THE YEAR 1889
ON THE
COMMERCE AND AGRICULTURE OF ALGERIA.

REFERENCE TO PREVIOUS REPORTS, Annual Series Nos. 469 and 563.

Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1890.

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FRANCE.

ALGIERS.

Consul-General Playfair to the Marquis of Salisbury.

My Lord,

Algiers, March 10, 1890.

I HAVE the honour to enclose my Annual Report on the Commerce and Agriculture of Algeria.

I have, &c.

(Signed) R. LAMBERT PLAYFAIR.

Report on the Agriculture and Commerce of Algeria.

The year 1889 will be memorable in Algeria on account of the honourable position it took at the Exposition Universelle de Paris. The Government General caused a series of special hand-books to be prepared for illustrating the industry of the colony, of which the following is a list:—

1. Exposition Universelle de 1889. Section de l'Algérie. Catalogue officiel des exposants. 12mo., pp. 322, with illustrations.
2. La Navigation Maritime et la pêche Côtière en Algérie. 8vo., pp. 62.
3. Région du Chêne-liège en Europe et dans l'Afrique Septentrionale. 8vo., pp. 54.
4. Plantes Médicinales, Essences et Parfums. 8vo., pp. 40.
5. L'Halifa. 8vo., pp. 22.
6. Les forêts de l'Algérie. 8vo., pp. 72.
7. Catalogue des Collections de bois Exhibées à l'Exposition Universelle de Paris en 1889. 8vo., pp. 53.
8. De la Colonisation en Algérie. 8vo., pp. 30.
9. La Viticulture Algérienne. 8vo., pp., 45.
10. Les laines et l'Industrie lainière de l'Algérie.
11. Espèces Chevaline et Asine. Le Mulet en Algérie. 8vo., pp. 82.
12. Les travaux publics en Algérie. 8vo., pp. 103, with diagrams showing the "développement du Mouvement Commerciales des Ports de l'Algérie."
13. L'Agriculture en Algérie. 8vo., pp. 77.
14. Carte Géologique de l'Algérie. Description Stratigraphique Générale de l'Algérie. Etude succincte sur les roches éruptives de cette région. 8vo., pp. 211 + 90.
15. Notice sur les sources Thermales et Minérales de l'Algérie. 8vo., pp. 95.
16. Notice Minéralogique par le Service des Mines. 8vo., pp. 74.
17. Horticulture Générale. Végétation, Culture spéciale, Acclimatation. 8vo., pp. 22.

(827)

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I have made liberal use of the foregoing, without confining myself strictly to them; and as this may be said to be an exceptional year, and as it is not easy to draw a hard and fast line between agriculture, industry and commerce, I trust that I may be excused if, on this occasion, I send one general report embracing all the three subjects. Those who are especially interested in any particular subject may consult the works before indicated.

The place which Algeria took in the Paris Exhibition was somewhat disappointing, but the Algerian Pavilion gave, on the whole, a fair idea of the progress of the colony, and of the richness of its products in textile fabrics, wool, timber, cork, marbles and minerals, cereals, oil and wine, as well as of the progress which it has made since the last exhibition. More than 850 recompenses were awarded to exhibitors, including 179 gold medals.

Not only did the Government of Algeria do all it could to induce the natives to take part in it, and to associate their productions with those of European exhibitors, but it sent about 40 of them to reside in Paris to acquire the knowledge which only such a residence could give to them, and to instruct the public generally regarding the races which inhabit the colony.

The number of exhibitors was 3,825, and the recompenses awarded to them were as follows:—

Grand prix or equivalent diplomas	..	..	..	5
Gold medals	..	..	..	179
Silver medals	..	..	..	568
Bronze medals	..	..	..	496
Honourable mention	..	..	..	588
Total	..	..	..	1,836

AGRICULTURE.

Agriculture.

Great fears were entertained regarding the coming harvest, on account of the unusual lateness of the autumnal rains, but during the month of December they fell in great abundance all over the colony: the harvest promises well, and no disasters from excessive rain have been reported, save in the oases of the Beni Mزاب, and other parts of the Saharan region, where rain is of rare occurrence, and generally causes considerable damage when it falls heavily.

Cereals.

The cereals during 1889 have not yielded more than one-third of a normal crop, but, fortunately, good prices have been maintained. Agriculturists never dream of using chemical manure; stable manure is not procurable in sufficient quantity, and the only means used of preserving the fertility of the soil is that of allowing the land to remain fallow one year out of three or four.

Agricultural population.

The agricultural population of the colony on January 1, 1889, was 3,264,708, showing an increase as compared with the previous year of 18,409 persons.

Agricultural material.

The value of agricultural material, in the possession both of Europeans and natives, was stated at 24,746,543 fr., an increase of about 250,000 fr.

The following table shows the amount of cereals of all kinds Cereals. grown in the colony during the season of 1887-88:—*

Cereals.	European Cultivation.		Native Cultivation.		Total.	
	Superficies Cultivated.	Quantities Harvested.	Superficies Cultivated.	Quantities Harvested.	Superficies Cultivated.	Quantities Harvested.
	Hectares.	Metric Quintals.	Hectares.	Metric Quintals.	Hectares.	Metric Quintals.
Hard wheat...	123,655	1,032,080	66,291	392,037	189,946	1,424,067
Soft wheat ...	124,618	750,309	924,490	3,305,628	1,049,108	4,055,837
Bye	433	3,274	4	22	437	3,296
Barley	107,749	811,643	1,311,805	6,084,503	1,419,554	6,896,146
Oats	49,309	524,870	1,939	15,256	51,248	540,126
Indian corn...	3,883	41,040	8,533	35,486	12,416	76,526
Millet	5,798	62,822	23,566	164,492	35,364	227,314
Total	415,445	3,225,968	2,342,628	9,997,324	2,758,073	13,223,312

Wheat.—The Préfet of Oran sent to the Paris Exhibition a Wheat. plant of wheat consisting of 180 branches; it is by no means rare to find the weight amounting to 78 kilos. the hectolitre.

Barley.—The competition caused by Indian and American Barley. wheat being so great, it has been suggested that colonists should turn their attention to barley, the cultivation of which has not increased during many years. There is a greatly increased demand for it in France, and the whole of North Africa is especially suited for this cereal. It seems to have been neglected principally because it produced so little straw, and because comparatively little beer was manufactured, either in France or in Algeria. There is great need, however, for the selection of better seed than that at present used.

During the year under review, the area sown was greater by 128,603 hectares than during the previous one, and the amount of grain harvested was less by 1,500,000 metric quintals. This was owing in some measure to drought in the province of Constantine, but much more to the ravages of locusts. Surface planted and return.

Market Gardening.—As irrigation increases, the area devoted to market gardening is extended from year to year. Almost every species of vegetables grown in the south of Europe flourishes here in even greater luxuriance; not only are the markets of the colony well supplied, but a considerable trade in early vegetables is done with France, especially between the middle of December and the end of January. Artichokes are sent to Paris from December to March; early potatoes about Easter; cauliflowers and asparagus in February. These appear to be the only kinds which bear the journey without injury. Market gardening.

* It is difficult in a document of this nature to give all the English equivalents of French metric weights and measures, but the reader will easily be able to reduce them by remembering that:—

1 metre is equal to	3 feet 3 $\frac{3}{4}$ inches
1 kilometre "	$\frac{5}{8}$ of a mile
1 hectare "	2 $\frac{1}{2}$ acres
1 litre "	1 $\frac{1}{4}$ pints
1 hectolitre "	22 imperial gallons
1 metric quintal is equal to ..	220 $\frac{1}{2}$ lbs. avoirdupois.

Ramie.

Great hopes have been founded in Algeria on the successful cultivation of the ramie, the nettle from the fibre of which Chinese grasscloth is manufactured. This subject has engaged the attention both of the cultivator and the manufacturer, but it cannot be said that from their united point of view the question has been definitively settled.

There appears to be no great difficulty about the cultivation of the plant. Experiments have been made at Algiers, Boufarik, Staoueli, Bône, l'errégaux, and St. Denis du Sig, and wherever it has been planted it has succeeded, at least in land capable of irrigation, and it has yielded 3 and sometimes 4 "cuts" per annum.

The first year is devoted to planting and preparing the soil, without any return; the second may be expected to yield half a crop; the third, three-quarters; and by the fourth it should be in full bearing.

It is planted out in rows, 50 centimetres apart, and at distances of 25 centimetres from each other in the lines, thus giving 80,000 plants per hectare. In the fourth year the plant is expected to produce 12 useful shoots, each of which will weigh about 12 grammes. Allowing 4 "cuts" per annum and 75 per cent. for loss after drying and cleaning, there should be produced in the fourth year 46,000 kilos. of stalks, yielding 11,500 kilos. of fibre.

One hectare, therefore, should produce:—

First year	..	..	..	..	..	Nil
Second year	..	..	..	..	..	5,752 kilos.
Third year	..	..	..	..	..	8,625 "
Fourth year	..	..	..	..	..	11,500 "

A farm of 100 hectares, or 250 acres, may be expected to produce the following results: supposing the land to cost 250 fr. per hectare, allowing 30,000 fr. for farm buildings, 5,000 fr. for agricultural implements, 6,000 fr. for cattle and horses, 20,000 fr. for making a nursery of young plants, 40,000 fr. for preparing the land, and 150,000 fr. for planting out and general costs during the first year, when there is no return, the result is that 300,000 fr. must be expended during the first year, or 300 fr. per hectare.

Add to this the sum of 800 fr. per hectare for cultivation during the subsequent years, and the result will be 1,150 fr. per hectare for the production of 11,500 kilos. of fibre.

The fibre, therefore, will cost the producer 0.10 fr. per kilogramme; add to this 8 fr. per 100 kilos. for decortication, 7 fr. for transport, and we have a total cost of 25 fr. per 100 kilos. for the cleaned fibre, landed at its destination.

It is stated that this produce will never fail to command a price of 35 fr. per 100 kilos., so that the cultivator may expect a profit of 10 fr. per 100 kilos., or 1,150 fr. per hectare; a return which can hardly be expected from any other kind of culture, even that of the vine.

So much for the producer; but how is he to sell his produce? If he submit the stalks to the process of decortication himself, in

order to save the cost of transport, he may injure the fibre, or produce something which the purchaser may find unsuitable. Until this question is satisfactorily settled the cultivator can hardly be expected to devote his land to an uncertain culture, and experts are not yet agreed as to the best implements for cleansing and preparing the stalks, or whether the operation should be performed by the producer or by the purchaser.

Another question to be considered is that ramie is a most punishing crop, and that the land will require to be heavily manured after the fourth year.

Tobacco.—During 1888–9 tobacco was cultivated over an area of 10,143 hectares, the produce of which was 5,502,053 kilos. During the previous year the surface was considerably greater, but the result was more than 500,000 kilos. less.

Viticulture.—The amount of land under cultivation with vines and the quantity of wine made in 1888 was as follows:—

Department.	Superficies Planted.	Quantity of Wine Produced.
	Hectares.	Hectolitres.
Algiers	32,650	1,212,570
Oran	36,694	962,519
Constantine .. .	27,922	578,796
Total	97,266	2,753,885

This result, compared with the previous year, shows an increase of 15,644 hectares planted, but a very slight augmentation in the quantity of wine produced.

The position which this colony has attained during the last few years as a wine-producing country is astonishing even to Algerians. In 1888 the province of Algiers occupied the fifth place amongst all the departments of France in which wine is a staple industry, while Oran and Constantine were not very much behind.

The total amount manufactured during the year under review was (in round numbers) 2,700,000 hectolitres, which at 15 fr. per hectolitre amounted to 40,500,000 fr. Of this about one-half represents the value of produce sold out of the country.

The great question now being debated is, should the plantation of vines be continued or not? The reasons for and against it are numerous. The climate is everything that can be desired; land is available all over the country, and at a reasonable rate; other cultures seem hardly to be remunerative, but cryptogamic and entomological plagues seem to be increasing year by year, although they are stated to be less troublesome than in France.

The great enemy to be feared and guarded against is the phylloxera. Up to 1885 it was unknown here, and it was hoped that the stringent laws which had been enacted to prevent its introduction would have had the desired effect. But the due

execution of these laws rested with too many persons to be thoroughly carried out. Owners of vineyards failed to report the appearance of the dreaded scourge, or were unable to identify it if it did appear. The immediate consequences to them, by the process of stamping it out, were so terrible that they shut their eyes to the truth, or trusted that it might not become known.

In 1885, however, there could be no further doubt that the phylloxera had effected a settlement in Algeria. It was distinctly observed in the neighbourhood of Tlemçen, and very soon it began to cause great destruction in the vineyards in the province of Constantine, between Philippeville and the frontier of Tunis.

During 1888-89 all the vineyards in the three departments were thoroughly inspected by syndicates appointed by the vine-growers themselves at their own cost, while the treatment and extinction of the plague, in land declared by them to be infected, was undertaken by the State, at the public charge, as also was the payment of indemnities to proprietors. One new locality has been declared infected at Mascara, but it is stated that, owing to the energetic measures adopted, the disease has disappeared there. With this exception the sanitary condition of the vine is reported to be satisfactory.

Destruction
of insects.

On December 24, 1888, a law was passed regarding the destruction of insects, cryptogamic plants, and other vegetables injurious to vines and to agriculture generally. The *Préfets* are charged to prescribe the necessary measures, after consulting with the *Conseil-Général* of their departments, and receiving the approbation of the Minister of Agriculture. All proprietors, even Government departments, are bound to allow their land to be inspected, and to comply with the orders that may be issued, and sundry pains and penalties are imposed on any who may act in contravention to this law.

Wine at the
Paris Exhibi-
tion.

Algeria sent numerous specimens of wines, spirits and liqueurs of various kinds to the Paris Exhibition. From Algiers and Constantine there were about 600 exhibitors, from Oran 500: in all about 4,000 specimens were sent.

Grapes for the
table.

Considerable attention has been paid during the last few years to the production of grapes for the table, both for local consumption and for exportation. Early grapes are generally grown on the littoral, and the species which yield the best results is that called the "Chasselas de Fontainbleau." It arrives at maturity in the beginning of July, sometimes even at the end of June. The fruit is carefully packed in small boxes and sent to France. Almost more valuable than these are the very late varieties, which are produced in the interior, generally in the Kabyle mountains; they are of native origin, and some do not ripen before November or December, and are generally of large size and great beauty.

License duty.

An important measure has recently (September 23, 1889) been taken by the Minister of Finance, at the suggestion of the Governor-General, for the encouragement of viticulture in Algeria. The producers of wine and alcohol in the colony will

no longer be compelled to pay the *license* duty in France, which has hitherto been obligatory when selling their wine wholesale in the mother country.

It is believed that this will give a stimulus to the manufacture of alcohol, not only from grapes, but from other fruits which exist abundantly in the colony, and which could be multiplied to any extent, such as the common fig and the prickly pear. The latter contains large quantities of juice, as much as two-thirds of its weight: it is rich in sugar, and after fermentation yields about 4.50 per cent. of absolute alcohol.

During 1888 the surface over which alfa was gathered was naturally very much the same as formerly, but the total quantity collected was only 1,905,715 metric quintals, or 344,285 less than during the previous year.

The entire quantity of alfa which reached the United Kingdom in 1888 was 248,000 tons, of which 87,000 were declared as coming from Algeria. This is roughly one-third of the whole amount, whereas in the previous year it was about one-half.

In one of my previous reports I mentioned that the Government had offered a prize for the best essay on the subject of alfa. This has been adjudged to Dr. L. Trabut, one of the professors of the Medical College at Algiers; and as this fibre has such peculiar interest for England, I purpose giving a very brief summary of the contents of this valuable memoir.*

The Arabic word "halfa," vulgarly alfa, is applied to several plants of the genus *Stipa*, but for all ordinary purposes it is limited to *S. tenacissima*, which is found over a great extent of country in the south of Spain, Morocco, Algeria, Tunis and Tripoli. Another species, the *Stipa arenaria*, or *macrochloa*, is found in Spain, and is principally used for the manufacture of coarse articles known as *sparterie*, such as baskets, cord, &c., and is much less esteemed than the Algerian species, which indeed is also exported from Spain.

The plant has a wide geographical range; the various places where it is found have many features in common, but they also differ considerably in other respects. It grows from the sea level up to an altitude of 1,800 metres; the only thing which seems fatal to it is marshy or undrained ground and persistent damp, especially when accompanied by cold. It delights in heat and drought sufficient to kill almost every other plant, and in undulating land where water cannot lodge.

In Morocco it occupies an immense region, from the high plateaux, which are a continuation of those of Oran, almost as far as Tangier, but it is only gathered near Mogador. It is found in the south of Portugal, in a province more arid than the rest of the country, that of Algarve. In Spain it covers a large space on the plateaux included within a triangle, of which the three points are

* *Étude sur l'Halfa (Stipa tenacissima)*, Alger., 1889, 8vo., pp. 90, with xxii. plates.

Malaga, Valencia, and Madrid. It abounds in the province of Murcia and Almeria (near Granada), Huescar, Guadalajara, Albacete, Toledo, and in other places. In Algeria it extends from the littoral of Oran to the Ksours, and the plateau of the Oulad Sidi Checkh, south of a line passing through Sebdou, Daya, Saida, and Frenda. In the department of Algiers it does not reach the littoral, nor does it occur in any region where the rainfall is, on an average, as much as 60 centimetres per annum. It does not extend north of a line passing Tiaret, Teniet-el-Ahd, Aumale, the Beni Abbas, and the Biban; it abounds in the high plateaux in the region of Ain-Oussera, Chellata, Razdeba, Djelfa, round Bousaada, in the mountains of the Oulad Näil, round El-Aghouat, and as far as the Oued Mia. In Constantine it occurs in the region west and south of Setif, the Bou Taleb, and the Mäadid. It covers a great part of the lower spur of Djebel-Aurès, near Batna, but never spreads to the plain below. It is found near Tebessa, and extends into Tunisia, passing Feriana, Gafsa, Djebel Zeitouna, Sbeitla, and as far as Kerouan. Further south the plateaux of Matmata and of the Hauina are also covered with alfa.

It spreads into the vilayet of Tripoli, and even further east, passing Djado, Zintan, Djebel Nefoussa, Djebel Zefen, Djebel Shanem, and Djebel Cherchera.

The phases of vegetation of the alfa are as follows:—In the commencement of spring the old leaves enter on a period of activity, profiting by the first return of warm weather. The young leaves, which began to appear in autumn, are developed, burst forth, and the functions of vegetable life attain their maximum of intensity. About the end of April or the beginning of May the flowers appear, and by the middle of June the seeds are ripe. In July the plant enters a period of repose, which lasts till the first rains of autumn, when it again enters into a period of activity.

The fecundation of the seed is very irregular; the stamens are rich in pollen, and the ovaries are well developed, but many of the flowers seem absolutely sterile, and the seed vessels dry up without reaching maturity. The seed which does ripen is carried, often to a great distance, by the dry wind of summer, and commences to germinate after the first rains of autumn. It requires five or six years for the young plant to attain its normal height, and nearly 15 before it can be plucked. But nature has a much more expeditious means of renewing the plant by rhizomes, which often travel a considerable distance in the sand and throw up new shoots, generally in a circular form, round the old plant, each of which in time becomes a centre for still further propagation.

The cultivation and artificial propagation of alfa has been attempted in Spain, but never in Africa.

Both in Spain and in Algeria the period for gathering alfa is fixed by law, but both countries waited too long before introducing this salutary measure. In the latter country there is a

close period from January 1 to June 30, subject, however, to modification according to circumstances. In Morocco, Tunis and Tripoli there is no restriction whatever.

The usual method of plucking the plant is by means of a stick 40 centimetres long, which the gatherer attaches to his left hand by a leather strap; he seizes with his right hand a packet of leaves, turns them round the stick, and pulls them out with both hands. He can thus gather from 30 to 40 kilos. per hour. Spaniards are far more adroit at this work than Arabs, and gather much more during the course of the day, but they injure the plant more seriously than the Arab. The average amount that workmen can collect of green alfa is about as follows:—

Spaniards	..	..	..	..	..	300 to 400 kilos.
Arabs	..	..	..	..	..	150 to 200 "
Women or old men	..	..	..	..	..	100 "
Children from 12 to 15 years	..	..	..	..	..	35 to 40 "

The green alfa when plucked is placed upright in small bundles to dry, an operation which does not require more than from three to four days. The fibre loses from 18 to 40 per cent. of its weight during the operation. It is then transferred to depôts, where it is sorted and classed according to its length; the longest fibre is reserved for the manufacture of sparterie, the shorter is used for paper. In the English trade the various qualities are known by the terms good, fair, inferior, brush and cord. The best qualities sometimes average about 50 per cent. of the entire quantity, but at other times it is as low as 1 per cent.; the fair may amount to 70 per cent., and the worst quality to 20 per cent.

The various kinds are then pressed by hydraulic machinery, bound with iron bands, and sent off to the port of shipment.

There is no doubt that during the past 20 years the amount of alfa plants has been steadily decreasing, and in some places where it was formerly found there is no trace of it remaining. This is principally due to the custom of collecting it during the period of vegetation, and by unskilful manipulation of the plant.

The various countries which export alfa are—

Spain, where it has been in use for ages. The exportation from 1868-72 amounted to 90,000 tons annually; now it is reduced to 45,000 tons.

In Algeria the export commenced in 1863; in 1870, 33,000 tons were exported; the maximum, 110,000 tons, was attained in 1879; now it is about 80,000 tons.

Tunisia exported 33,000 tons in 1879; now 100,000 tons are exported.

Tripoli exported 80,000 tons in 1881; the production may now be stated at 75,000 tons.

Morocco only exports about 3,000 or 4,000 tons from Mogador.

During the past few years the aggregate exportation of alfa from the before-mentioned countries has been increasing, whereas the demand for it has shown a tendency to decrease. From

1860 to 1869 the total exportation was not more than 95,000 tons, in 1876 this had nearly doubled, in 1881 it was 200,000 tons, and in 1887 225,000 tons. The price has greatly decreased, and the time seems not to be far distant when it will not be profitable to gather it at all.

Every day wood-pulp is becoming more used, and employed with increased effect, not only in the manufacture of paper, but of various other substances, formerly made chiefly from alfa. It is the manufacture of paper which consumes the greatest part of the alfa exported from the countries which produce it. Thus, out of the 225,000 tons exported, 210,000 tons are said to be destined for that industry. The United Kingdom is the principal market, and takes 200,000 tons; the small remainder is purchased by France, Germany, and Belgium. The quantities sent to Italy, Austria and Belgium are hardly appreciable.

In Tunis alfa pays an export duty of 1 fr. 25 c. per 100 kilos.; in Morocco, 2 fr. 50 c.; in Algeria and Tripoli it is free.

Esparto grass. There is another graminaceous plant often confounded with alfa, the "*Lygeum spartium*," or the esparto grass of commerce. This occurs in many parts of the Mediterranean basin, including the north coast of Africa, but it is not gathered in or exported from Algeria to any considerable extent.

Locusts. This year will also be remembered, in a less satisfactory manner, for the renewed destruction caused by locusts, and for the active warfare waged against them. The invasion commenced in the previous year, but the authorities were taken by surprise, and had not sufficient means at their disposal for grappling with the pest. I explained in my last report the means taken for providing funds by "*bons à lot*," emitted by the *Crédit Foncier*. The sum of 5,000,000 fr. thus obtained was divided into three portions: one was placed at the disposal of the relief committees at Algiers and Constantine; the second was devoted to the workmen engaged in destroying the eggs. This proved very successful; for a sum of not less than 250,000 fr., 500,000 double decalitres of eggs were collected, representing 400 milliards of insects: in other words, it was found possible with one-quarter of the expense to destroy six or seven times the number of insects, by collecting their eggs, than would have been possible had operations been undertaken only after the eggs had been hatched. Contrary, therefore, to what has been alleged, it is believed that the collection of eggs is the most efficacious method of destroying the locusts. The rest of the 5,000,000 was spent in purchasing the necessary material, consisting of 6,000 apparatus of the Cyprus model, with a length of 300 kilometres.

A perfect army of labourers was employed on the work, but they were altogether insufficient, although in some places the entire population was requisitioned for the work. The military had to be employed, not only those in garrison near the places infested, but reinforcements had to be sent from Algiers and Oran. At one time there were not less than 10,000 soldiers, in addition to the civil population, employed in striving to destroy the crickets.

The result has been that, to a great extent, the crops have been saved; still the victory is not complete, and the war must be continued in the coming season. Means also will have to be adopted for raising the necessary funds for the present, and for creating a reserve for the future.

Two decrees, dated February 18, 1889, were issued—first, to ^{Beasts.} fix the tariff for the sanitary inspection of all animals imported and exported; and second, to determine the number of veterinary officers to be appointed in each department. It is hoped that in future great public advantage will result from the compulsory examination of such animals.

The number of beasts of all kinds belonging to Europeans and natives at the beginning of 1889 was as follows :—

Beasts.	Belonging to		Total.
	Europeans.	Natives.	
Horses	31,950	158,235	190,185
Mules	20,969	115,588	136,537
Asses	12,880	293,680	306,560
Camels	112	299,834	299,946
Cattle	128,549	1,098,529	1,227,078
Sheep	288,767	10,424,159	10,712,926
Goats	70,254	4,517,465	4,587,719
Pigs	82,888	850	83,228
Total	636,369	16,907,320	17,544,189

This shows a decrease of 429,242 as compared with the previous year.

North Africa was certainly supplied with horses of Oriental ^{Horses.} origin before the Arab invasion; but the religion of Mohammed, which enjoins love and care towards horses, tended to improve the race. The Arabs of the Sahara especially know the value of good blood; they take the greatest care in the matter of crossing and the improvement of the species: the horse is the companion in arms of the chief, and the friend of every member of his family.

The best horses are found there. In the Tell the Arabs employ their horses for farm purposes, and do not take the same precautions to improve the breed; therefore it is hardly to be expected that the same excellence should be found there. The true desert Arab will not employ his horse in drudgery; in his view it was created to be ridden; the bullock was meant for ploughing and the camel for carrying burdens.

The necessities of a rising agricultural colony have greatly modified the native race, but the State has done what lies in its power to maintain the purity of the African horse by the creation of Haras, by encouraging Hippic societies, and by offering prizes for the most successful competitors in the annual regional exhibitions.

The production of mules in Algeria does not seem to make ^{Mules.} great progress; the number in the colony in 1867 was 157,024,

and in 1887 it was only 140,899. In the former year Europeans possessed 6,477, and in the latter 22,030.

The Arabs of the mountains and the Kabyles pay the greatest attention to the breeding of this useful animal, and, as a consequence, they acquire extraordinary dexterity in traversing the most difficult and dangerous roads, carrying heavy loads up the most precipitous hills and down mountain sides, where it would seem as if no animal save a goat could find a footing. They are, of course, the product of the mare and the ass, but the greatest care is taken in the selection both of sire and dam. The Arabs of the plains also breed mules, but these have widely different qualities, and are better suited for draught purposes than for carrying burdens. It is animals of this class that are generally purchased and sometimes bred by the European colonist.

Both European and natives are in the habit of castrating the male, but it has been found impossible to perform a similar operation in the case of females; it almost always results in death.

Sheep and
wool.

The wool sent to the Paris Exhibition was so classified as to admit of the most complete study of the subject. In former exhibitions only some of the choicest fleeces were displayed, so as to make known the possibilities of the colony in this respect. On the present occasion every description and variety of Algerian wool was exhibited, from the worst to the best.

The whole superficies of Algeria contains about 47,880,784 hectares, and a population of 3,748,375 inhabitants of all races. There were 10,998,413 sheep and 4,785,431 goats.

Of the above area 12,584,235 hectares are under civil Government; the inhabitants therein are 3,298,536 in number, and the sheep and goats are respectively 5,928,803 and 3,303,538, or 2,786 of these animals for every inhabitant, and 1,356 hectares for the nourishment of each sheep or goat.

There are still 35,296,549 hectares under military rule, with a population of 449,439 inhabitants, almost entirely Arab. In this district there are 5,069,610 sheep and 1,481,893 goats; which gives, for this part of the colony, 15,774 animals for each person, and one animal for every 5,385 hectares. But this comparison gives very little idea of the true state of the case. The inhabitants of the more fertile regions have many more important pursuits than the rearing of sheep and goats, while with the nomad Arab it is the chief object of his existence.

It is the region of the high plateaux which is best adapted for this industry. In those immense tracts nothing grows but alfa grass, and the scanty vegetation which serves to support, and to support well, the flocks of the wandering Arab. But if we attempt to compare the number of sheep found in this region with the extent of pasturage, we see at once how scant the latter must be. The total number of sheep there hardly exceeds 6,000,000 or 7,000,000, while the region contains about 4,500,000 hectares, or 11,000,000 acres, so that it requires nearly two acres of land to maintain a single sheep.

Algerian wool has been much discredited by fraudulent practices to increase its weight; nevertheless it is good in quality and readily purchased, while the sheep themselves are eagerly sought for in France, where from 3,000,000 to 4,000,000 are sent every year; in some years this number has been nearly doubled.

No doubt neither Algerian wool nor Algerian sheep are of the first quality, but the latter possess qualities which might possibly disappear were the race modified to any appreciable extent. They can resist the greatest extremes of heat and cold, of abundant and deficient pasturage, absolute want of care, and the long and fatiguing marches necessary to send them to the port of embarkation. With all these disadvantages the race does not seem permanently to diminish. A season of unusual drought will often reduce the number, but the following season of abundance seems to restore it to its original average. Beyond this it seems impossible to raise it, owing to the scarcity of water during the summer months. The sheep require to be watered every two or three days, so they cannot be taken for pasturage to regions far removed from a supply of water. They are not in the least particular about the quality; they will drink what appears hardly better than liquid mud, or water so brackish as to be unpotable even to the Arab, but water of some kind they must have, and pasturage beyond a reasonable radius from springs cannot be utilised. Thus this perimeter is eaten down to the very ground, while succulent pasturage beyond it is left unutilised. Hardly more than one-fifth of the whole extent of the high plateaux is thus available. Until some means are found for creating a water supply in summer, such as artificial reservoirs for collecting the winter rain, there can be no hope of increasing the supply of sheep.

Algerian wool may be divided into two categories—Arab and Berber. The former is generally of a short fibre, sometimes moderately, rarely, if ever, very long, and regulated by the climatic influences of the localities where the sheep are reared. It is always short on the high plateaux, and becomes longer as the sheep descend into more fertile and better-watered regions; but in both instances it is pure wool, of a fine quality, and without any hairy appearance—the relic, it may be, of the now lost merino stock, supposed to have been introduced by the Romans, and subsequently perfected by the Moors of Spain, who certainly drew their original supplies of wool and of sheep from North Africa.

The Kabyle, or Berber wool, on the other hand, is entirely different; it is hard, coarse, inelastic and almost resembling goat's hair.

If we examine the geographical distribution of these varieties, we find that the second is confined to mountainous and sometimes inaccessible regions, where there is constant pasturage, and the migration of flocks is unnecessary in the summer season, whereas the first category exists in the high plateaux and wide valleys where constant migration is practised. Each appears to have followed the fortune of their masters; the Kabyles, descendants

of the aboriginal race, still live in the wild mountainous region in which their ancestors so jealously guarded their independence, and refused all intercourse with the numerous hosts of invaders who periodically overrun the lowlands around them. These, as well as their flocks, continue to preserve much of their original rugged nature.

In the more accessible regions, on the other hand, all trace of an indigenous race has disappeared; it has been supplanted by the Arab nomad. So also has the original character of the sheep been modified by climate, importation from Arabia, crossing and more or less judicious selection.

Goats.

The number of goats has been before stated at nearly 4,800,000, which is at the rate of about 1 goat for every 2·5 sheep. The rearing of these animals is a most important question. They thrive in places where the sheep will not prosper; and though the advocates for reforesting the country hold them, not without reason, in abhorrence, any attempt to restrict their number would entail the ruin of vast regions, and a considerable population almost entirely dependent on them for existence.

Ostrich farming.

Several attempts at ostrich farming have been made in Algeria, but always without success. The localities have been badly chosen; the region of the Tell, admirable for ordinary agriculture, is unsuited for the wants of these birds, who delight in dry, sandy soil, and are never found where cultivation flourishes.

A last attempt is now being made, which will prove whether or no it is possible to rear ostriches in captivity in North Africa.

The Société Agricole et industrielle de Batna et des Sud Algérien, of which M. Rolland, engineer of mines, and one of the greatest authorities on the Sahara, is administrator, has made a new experiment—this time in the oasis of Ayata, in the Oued Rir, which will be followed with great interest, and will probably decide the question.

Colonisation.

A very strong opinion is felt and has been generally expressed that the time has passed for giving gratuitous concessions of land to immigrants from France. It seems reasonable enough that any land at the disposal of Government should be reserved for the children of colonists born in Algeria.

A colonist recently writing to a local paper very properly remarks:—"There is no want of land in Algeria, and I advise all who may desire to acquire a farm to purchase or rent it, rather than to demand a concession, which the administration will not deliver for six months or a year. It is repugnant to an honest cultivator to go from bureau to bureau soliciting a concession, the value of which he will have to pay by a year's fruitless waiting, even if he obtain it at last. Let the State create as many villages as it pleases in the vicinity of railway stations, to establish therein groceries, drinking bars, auberges, for the surplus of the town population; but let true colonists, either from France or Algeria, purchase farms of from 80 to 100 hectares in the vicinity, it will only be the 'véritable paysan' who will occupy them."

A communion has been formed in each of the departments to examine carefully all the land now classed as forest, and to report what portion of it may, without prejudice, be made over for the general purposes of colonisation. It is calculated that nearly 500,000 hectares of land exist, on which the forests are of no appreciable value, but which may either be suitable for the creation of new centres, or at least be given over to Arabs in exchange for land now in their possession, which may be required for European culture.

According to the most recent statistics the surface of forest land in Algeria is as follows :—

					Hectares.
State property, civil	..	..	..	..	1,754,256
„ military	..	..	..	..	744,356
Communal forests	..	..	..	..	78,685
Private forests	..	..	..	..	468,395
Native forest land	..	..	..	..	202,000
Total	..	..	..	..	3,247,692

Of this superficies 2,085,239 hectares is situated in the Mediterranean region, and occupies the sixth rank amongst the forests of Europe, as regards the actual amount of timber contained in it.

The forests were given away in the most reckless manner in the first years after the conquest: what remains is carefully protected by the Forest Department.

Since my last report two new lines of railways have been opened in their whole length.

1. From Bougie to Beni-Mansour.

2. From Oulad Rahmoun to Ain Beida.

That from Tabia to Tlemçen will shortly be finished. At the present moment the total length of railway lines in the colony is 2,705 kiloms.

In 1889 the roads in Algeria, exclusive of those not classed, were as follows :—

					Kilometres.
Routes Nationales	..	..	..	..	2,928
„ Departmentales	..	..	..	..	688
Chemins d'Intérêt commun et de grande communication	..	..	..	..	9799
Total	..	..	..	..	13,415

The rapidity with which these have been constructed may be judged by the following figures:—

						ROUTES NATIONALES.	Kilometres.
In 1839	..	..	..	..	..	..	323
1859	..	..	..	..	..	..	1,162
1879	..	..	..	..	..	..	1,765
1889	..	..	..	..	..	..	2,928

All other classes have increased in similar proportions.

The dryness of the climate is one of the obstacles to the Irrigational works
(827) B

development of agriculture in Algeria; even in places where there is an abundant rainfall, the quantity is unequally distributed amongst the various seasons, and so does not always suffice to ensure favourable harvests without irrigation.

In the high plateaux, in the plain of the Cheliff, and in a great part of the department of Oran, the rain of winter and spring is generally insufficient. There, artificial irrigation is absolutely necessary, and requires a very considerable volume of water. In these regions all the water, except that resulting from sudden floods, is utilised; but during years of drought the amount of the various streams and springs is insufficient for the perimeter susceptible of irrigation. The best method of storing and distributing these waters, therefore, is an important problem to be solved.

In the elevated zone, between the high plateaux and the sea, save in some exceptionally dry places in the department of Oran, the land is generally sufficiently watered by rain, and artificial irrigation is unnecessary; if the harvest suffers there, it is less from drought than from too late rain, which wets the grain when the heat is very great. In the drier region cereals grown without irrigation only succeed on an average of one year out of eight. In places where rain is abundant the reverse is the case; they fail only once in eight years.

Irrigation was practised in Algeria long before the French conquest, by means of rudimentary dams formed of earth and fascines of brushwood. Since the French occupation many new canals have been opened, the old ones have been improved, and in several places large reservoirs have been constructed by the State and placed at the disposal of colonists. The cost of irrigating land by this means is of course paid by the parties interested, and varies from 4 fr. 50 c. to 10 fr. per hectare.

Garden land pays a higher rate, from 25 to 53 fr. per hectare, and even more.

The whole amount of irrigable land in Algeria is as follows:—

				Hectares.
In the department of	Oran	..	..	78,925
"	"	Algiers	..	33,214
"	"	Constantine	..	21,754
Total				133,893

The following are some of the principal irrigational works:—

Valley of Sig.

The valley above St. Denis de Sig consists of two separate parts; the upper portion above the gorges has a length of 130 kiloms., and constitutes the syndicate of Sidi-bel-Abbes. It is to the north of this, where the valley becomes narrow, and the river flows between steep gorges, that the great barrage of Sig has been constructed. A small one had been made by the Turks, and perhaps even existed in the time of the Romans. This was restored by the military authorities in 1858, and consisted of a

dam 19 metres in height and 100 metres in length, containing a volume of 3,000,000 cubic metres of water.

Owing to the development of colonisation the barrage was found insufficient, and a syndicate was authorised to construct another one, six times as large, higher up the valley. This had hardly been finished when, on the 8th February, 1885, it was carried away, destroying in its course the smaller barrage below it. The writer was standing on the latter when the former gave way, and barely succeeded in saving his life. The quantity of water which immediately spread over the plain may be appreciated by imagining a column, the base of which is an acre and the height as high as the top of Mont Blanc!

These two barrages are in course of restoration; they originally cost 1,300,000 fr., and their re-edification is estimated at 1,600,000 fr.

Another most unfortunate barrage has been that of the Basin of the Habra, at the confluence of the Oued-el-Hammam and the Oued Fergoug, which is fed by a hydrographical basin of 10,000 square kilometres, and is capable of containing 30,000,000 cubic metres of water. This burst in 1881, causing great damage and loss of life. It belonged to a private company, but it has now been entirely restored by the State, in the most solid manner, at a cost of 1,367,324 fr.

There are several other irrigational works in the province of Oran, but the only very important one of these is the barrage of the Cheliff, about 25 kiloms. above Orleansville. This is the principal river of Algeria, rising in Djebel Amour, and falling into the sea, after a course of nearly 700 kiloms. The water retained by this dam is sufficient for the irrigation of 2,400 hectares on the left bank and 7,700 on the right.

The irrigational works in the provinces of Algiers and Constantine are much less considerable, and do not necessitate special notice.

There are no great natural harbours on the coast of Algeria; but there are numerous small bays more or less sheltered, some from westerly and others from easterly winds, with good holding ground and easy landing, which have been converted into ports by the French at a total cost of about 107,000,000 fr.

The following is a short description of the present condition of each, commencing from the west:—

The roadstead of Nemours is a small open bay between two salient capes, exposed directly to the north. The beach is favourable for debarking goods, and there is easy communication with the interior. The place can only be approached, however, in fine weather.

Beni-Saf is situated four miles to the east of the mouth of the Tafna, at the bottom of an open bay which extends from Rachgoun to Cape Figallo. The harbour is rectangular, and is formed by three jetties on the east, west and north. It contains an area of 18 hectares, with an average depth of 8 metres. The opening is 160 metres wide, situated between the north jetty and the extremity of

the east one. There is no railway communication with the interior. It is entirely artificial, and the jetties are made of blocks of concrete and masses of stone. The whole expense of the construction has been borne by the company to which the iron mines in the vicinity have been conceded.

Mers-el-Kebir. Mers-el-Kebir is an open roadstead with good anchorage, easily accessible: a road along the sea shore leads to Oran.

Oran. This was originally the only port of Oran, but several attempts were made, more or less successfully, to create one at Oran itself.

The present port was made in conformity with a law of 1860. It consists of two jetties: one of them, called the *Jetée du Large*, protects it from northerly winds, and forms a curve of 1,035 metres in length; the other, *Jetée de Sainte Thérèse*, shuts the harbour in from the east. It is 297 metres in length; the entrance passage between these being 126½ metres in width.

The first was originally formed by masses of stone, with an exterior revetement of artificial blocks of concrete, descending 6 metres below the surface of the sea: a length of 550 metres was finished on November 1, 1869, when a violent tempest completely obliterated it. A stronger profile was then adopted, and now a section of the first 750 metres shows a trapezium of 26 metres in width at the sea level. The exterior slope is riveted with blocks of concrete to 3 metres above the sea level; above this is a platform 8 metres wide, at a height 2·80 metres above the sea; the whole is crowned by a parapet 4·50 metres wide and 4 metres high. This also is protected exteriorly by blocks of concrete.

Beyond this 750 metres the platform is only 7 metres wide.

Another storm, on February 9, 1888, caused serious damage, but this has been restored.

The *Jetée de Sainte Thérèse* is much less exposed: it is composed of rough stone work, crowned by a masonry platform 7 metres wide, at 2·80 metres above the sea.

Behind the shelter of these two breakwaters, quays have been made to the west and south of the port, the whole length of which is 1,907 metres, and communication is established between them and the railway station. The surface of the harbour is 30 hectares; the quays have a superficies of six hectares.

The commercial importance of Oran is considered sufficient to have warranted this heavy outlay. It is the natural outlet for the produce of all the region traversed by the railway as far as Orleansville, as well as that through which the line from Arzew to Saida, from Tlelat to Sidi-bel-Abbes, and from Senia to Ain Temouchent run.

Arzew.

Arzew is a large roadstead with excellent anchorage, well sheltered from the north-west by *Djebel Arousse*. This is entirely a natural harbour, but a jetty of 280 metres has been run out from the point of the hill, which shuts in the bay to the north. Its breadth at the water line is 12 metres. Arzew is in communication with Oran by means of an excellent road, and with the south by the railway to Saida and Ain Sefra. Another line,

or rather a steam tramway, 20 kiloms. in length, leads to the salines, or salt pans of Arzew.

Mostaganem is an open roadstead, fully exposed to the north-west, where vessels can only lie in very fine weather. The project for creating a port here was sanctioned by the law of August 29, 1885, at an estimated cost of 3,000,000 fr., and the town of Mostaganem has been authorised to raise the sum necessary for the works. Mostaganem is connected by good roads with the Dahra, the valley of the Mina, Hillil, and the lower course of the Cheliff. A narrow gauge railway, crossing the main line at Relizane, leads southward to Tiaret.

The anchorage at Ténès is fairly good in summer, but directly exposed to the north. A few islets give some shelter, and these have been utilised for the creation of an artificial harbour 1 kilom. to the east of the town. The surface sheltered by the breakwater is 24 hectares. Two landing piers were built, but destroyed by the storm of April 7, 1874. These will be restored when the breakwaters are entirely finished. The cost of the work will amount to upwards of 7,000,000 fr.

Cherchell is a small creek, protected from the north by the Joinville peninsula, and from the E.N.E. by a line of rocks, débris, and ancient piers. It has an area of 1.85 hectares. It is, in fact, the ancient Roman harbour of Julia Cæsarea, only slightly improved; nevertheless, a sum of 2,500,000 has been expended upon it.

At the conquest the only harbour at Algiers was that enclosed between the island of the Marine and the Causeway, which Kheir-ed-din built to connect it with the mainland. There was originally no idea of creating a marine establishment of any consequence at Algiers; an influential party in France, indeed, saw the necessity of permanently retaining the new conquest, but there were others who clamoured for its abandonment, or at least for localising French occupation in North Africa to a few points on the coast.

A series of disasters caused the French to take some steps for protecting their vessels when at anchor. The existing mole was prolonged in the direction of E.S.E., but there was nothing like a general carefully studied plan for the creation of a harbour. Works have been added from time to time, but the result is that the harbour which has sprung up is the most irrational on the coast. The breakwater, instead of running out straight, or forming a salient curve, actually describes a re-entering one, with the inevitable consequence that it is fully exposed to the force of the waves, and is severely injured by heavy storms.

The area of the harbour consists of 90 hectares, with a varying depth of from three to nine metres along the north and south jetties. In the middle it varies from 10 to 20 metres. The entrance is on the south-east, and is 250 metres wide.

The works which form this harbour are as follows:—

1. The north jetty, starting from the Admiralty, protects the port from the north-east. It has a length of 900 metres.
2. The south jetty, consisting of two portions—one starting

from the shore with a length of 500 metres, the other 750 metres long, running at right angles to it.

3. The jetty of Kheir-ed-din, 200 metres long, an old Turkish work restored by the French, uniting the Admiralty islet with the town.

4. The quays which border the whole landward side of the harbour: about 300 metres of these are reserved for naval purposes; the rest, 1,578 metres in length, are given up to commerce. The total area of these is 53,000 square metres.

5. Two docks, one of which is spacious enough to contain the largest vessels afloat; the other can accommodate ships not more than 65 metres in length.

The whole cost, up to the present time, has been 5,500,000 fr.

Several improvements have been sanctioned. One consists of prolonging the south jetty, so as to reduce the width of the entrance to 100 metres; another is to connect the island of El-Djefna by a mole with the shore. The Chamber of Commerce has consented to find the necessary funds, amounting to about 800,000 fr.

Dellys.

The harbour of Dellys is situated to the west of the bay, sheltered from the west and north-west winds by a projecting cape; a jetty of 100 metres in length is in course of construction, 60 metres having already been finished.

There is a landing pier, 80 metres in length, provided with a crane capable of lifting two tons. This harbour will never be of much use, unless the breakwater is prolonged to at least 200 metres. The cost will amount to about 2,000,000 fr., of which sum 700,000 fr. have already been expended.

Bougie.

The harbour of Bougie is an immense bay, sheltered from the north by the mountains of Gouraya, from the west to south by the beach, and to a great extent from the east to north-east by capes Cavallo and Bougaroni. Within this bay are three creeks; a jetty of a 206 metres in length has been built from point Abdel-Kadir, running in a southerly direction, and completely sheltering an area of from 7 to 8 hectares.

The cost of this last work has been 786,000 fr., but a project is being studied for creating an outer harbour of 64 hectares in area, with a jetty of 800 metres long, starting from Cape Bouac, the estimated cost of which will be about 9,500,000 fr.

Bougie is the natural outlet for the Oued-es-Sahel, and a considerable part of Kabylia. A railway runs from it to the main line at Beni-Manscur, and a fine road goes to Setif, through the picturesque gorge of the Chabet-el-Akhira.

Djïdjelly.

The harbour of Djïdjelly is formed by a line of reefs running to the east of the peninsula on which the old town was situated, but this only gives very imperfect shelter from north winds.

Collo.

There is excellent anchorage in the bay of Collo, and good shelter from the west and north, but art has done little to improve the natural advantages of the place.

Stora.

The bay of Stora is situated on the west coast of the gulf contained between Point Tarsah and Cap de Fer; it is only sheltered from west winds. This was at one time the anchorage of

Philippeville, but it has no longer any importance now that the harbour there has been completed.

The harbour of Philippeville is one of the most remarkable hydraulic works in the Mediterranean. On no part of the coast of North Africa is there habitually such a heavy sea and such bad weather as here. Over and over again the entire shipping in the bay has been driven on shore and wrecked, but as it is the nearest point to Constantine it was found absolutely necessary to overcome the natural difficulties which existed, and to create a secure harbour on this inhospitable coast.

A port has been created with masses of rock and blocks of concrete, containing an area of 58 hectares, and a depth of from 6 to 11 metres. It is protected on the north by a jetty 1,400 metres long, starting from Cape Skikda, and running in a north-west direction. On the west side there is another jetty 400 metres long from Château Vert, the pass between the two being 200 metres wide.

The profile of these works was about 6 metres in breadth, protected by 5 metres more of concrete blocks.

This was nearly entirely destroyed by the tempest of 1878, and it was determined greatly to increase the height and strength of the breakwater. Now the total width at the sea level is from 26 to 28 metres, and this is crowned by a parapet wall 12 metres high, in some places at least.

The cost of this work has been 18,250,000 fr. The station of the Constantine railway is close to the water's edge. All the quays have a revetement of magnificent blocks of white marble.

The city of Bône is built on the site of the ancient Hippo Regius, at the foot of Djebel Edough, on a bay contained between Cap de Garde and Cap Rosa. A harbour was built there in 1855, containing an outer harbour with an area of 70 hectares, and an inner basin of 11 hectares. The depth of the former is from 6 to $7\frac{1}{2}$ metres. It is formed by two jetties—one, called Jettée Rabayaud, 700 metres long, runs from north-west to south-east, and so on to south, forming an arc of a circle, the radius of which is 270 metres.

The south jetty runs at first from west to east, and then in the direction of the Jettée Rabayaud, leaving between them an opening of 400 metres. The inner basin forms a rectangle 400 metres long by 265 metres broad; the opening between it and the outer harbour is 70 metres. The cost of these works was upwards of 7,000,000 fr.

Very important works are in course of execution. They are—

1. The formation of a second outer harbour, having an area of 47 hectares. This will be formed by two jetties—one starting from the spot called "Rocher du Lion," and parallel to the Jettée Rabayaud at a distance of 700 metres; the other will be a prolongation of the south jetty of the original outer harbour.
2. The transformation of the original outer harbour into a "darse" by shutting the existing opening, and making a new one 70 metres from the commencement of Jettée Rabayaud; the construction of

a quay between the Jettée Rabayaud and the north traverse of the existing inner basin; and the creation of a maritime quarter which will be joined to the town by a cutting in the cliff. 3. The construction of a slip, the completion of the existing quays, and dredging the original outer harbour to a uniform depth of $7\frac{1}{2}$ metres.

These works have been declared of public utility. The expense is estimated at 10,000,000 fr., of which 7,100,000 fr. will be paid by the State, and the remainder provided by the town, partly as a subvention and partly as a loan. The city will have the privilege of acquiring the land thus recovered from the sea at a price of 1,600,000 fr.

La Calle.

The port of La Calle is formed by a little oblong creek, with an area of 4 hectares, formed by a long and narrow peninsula running from the mainland in a direction south-east and north-west. The sea at the entrance is sometimes so heavy as to render it impossible for boats to pass into the harbour. Several projects have been suggested for making a more satisfactory harbour; some have even been commenced and abandoned, but nothing satisfactory has been decided.

Minerals.

At the risk of repeating what I have stated at various times in former reports, I will briefly recapitulate the principal mineral riches of Algeria.

Lead.

Lead ore, more or less argentiferous, is found, principally in two places: at Ghar Rouban, in the province of Oran, not far from the frontier of Morocco, and at Cape Cavallo, near Djidjelly, in that of Constantine. Galena, associated with blend, calamine, and sometimes copper, is found in nodules and small veins at Bou-Thaleb, Tarerbil, and other parts of the province of Constantine.

Copper.

The most important copper mine is at Kef Omm-et-Teboul, near the Tunisian frontier; it is quite isolated, in a region where no other minerals have been discovered. But this metal is found in many other parts of the colony, and, after iron, it is the most abundant of all. It occurs in various forms, but chiefly as carbonate and pyrites, sometimes considerably but very irregularly argentiferous.

Zinc.

Zinc occurs in two forms as blend and as calamine, and in very small quantities as a soluble sulphate.

Antimony,
&c.

Antimony, mercury, chrome, and manganese are found in the east of the department of Constantine; pure manganese is rare, but it enters abundantly into iron ore, which frequently contains from 2 per cent. to 10 per cent. of it.

Iron.

Iron is the most important of all the minerals found in Algeria, and generally occurs so close to the surface that it can be worked in open quarries. In the west it is generally close to the sea, but in the departments of Algiers and Constantine, some of the most important mines are at a considerable distance inland. About 500,000 tons a year are exported.

Salt.

Salt is found in great abundance, both in the condition of rock

salt, and is formed by the natural evaporation of the salt lakes in the interior.

Some of the finest marble in the world is found in Algeria. Marble.
The following are the most important quarries:—

1. Ain Sebaa, south-west of Nemour. Alabaster of a yellow tint, veined with gray and red; very recently discovered.
2. Sidi-Brahim. Alabaster, like that of Ain Tekbalet, but not so fine; not worked.
3. Djouanif, near the mouth of the Tafna. Beautiful alabaster, well suited for architectural purposes. This quarry has recently been farmed out by the State.
4. Tekbalet, north-east of Tlemçen. A splendid alabaster, well known in commerce as Algerian onyx.
5. Oued Madagre, south-west of Oran. A fine serpentine, not worked.
6. Djebel Arousse, near Kleber. The finest of all, containing red, rose, and variegated marbles and breccias. This has been employed in mounting the statuary in the mausoleum gallery in the British Museum. A collection of specimens may also be seen in the British Museum at South Kensington under the name of "Numidian Marbles."
7. Zaaccur Chergui, 7 kiloms. north-east of Miliana. A calcareous stone of various colours; not worked.
8. Chennouah, 12 kiloms. north-west of Marengo, on the sea, a nummulitic breccia. This has been used for the National Gallery extension works.
9. Haoughni-Arous, 7 kiloms. south-east of Fondouk. Somewhat similar to the last; not worked.
10. Oued Keddara, 10 kiloms. south-east of Fondouk. Similar to No. 9.
11. Oued Kersari, 7 kiloms. north-east of Dra-el-Mizan. Somewhat similar to No. 7.
12. Constantine. A fine, blackish limestone, ordinarily employed there for funereal monuments.
13. Filfila, 16 kiloms. east of Philippeville. Fine white and variously-coloured marbles. Specimens may be seen in various buildings in Philippeville.
14. Mahouna, near Guelma. Rose-coloured marble; worked to a small extent.
15. Djebel Hallouf. Close to and similar to the last.
16. Oumel-Adail, near Ain-Mokra. Crystalline limestone; not worked.
17. Fort Genois, near Bône. Similar to No. 16.
18. Fort Zergua, near Souk Ahras. Resembles Algerian onyx.

Deposits of phosphate of lime have been discovered in the Phosphates.
west of Oran, in the territory of the Beni-Ouarsous, but the distance from the sea and the want of good roads is so great that it will be years before they can be turned to any good account.

There are other deposits near Souk Ahras, in the department of Constantine, but the colonists have not yet learnt the value of chemical manures, and they have not hitherto been much utilised, even for exportation.

The following tables show the amount of exports and imports during the years 1888 and 1889. It is not yet possible to obtain the values of the various items for the latter year, but for 1888 they were as follows:—

						Francs.
Exports	..	..	..	..	..	210,638,992
Imports	..	..	..	..	..	216,184,336

The exports show an increase of more than 10,000,000 fr. as compared with 1887, while in the imports there is a decrease of nearly 4,000,000. This indicates a state of prosperity which speaks for itself.

EXPORTS during the Years 1888 and 1889.

Nature of Merchandise.	Units.	1888.	1889.	Increase.	Decrease.
Horses, asses, mules ...	Number ...	3,561	1,865	...	1,696
Cattle ...	" ...	793,115	1,038,890	245,775	...
Hides, raw ...	Kilos. ...	1,996,050	2,380,237	384,187	...
Wool ...	" ...	11,643,206	9,459,054	...	2,186,152
Silk ...	" ...	4,652	1,722	...	2,930
Wax ...	" ...	51,661	69,465	17,804	...
Fish ...	" ...	2,987,258	3,052,658	65,400	...
Coral ...	" ...	7,472	14,990	7,518	...
Horns, hoofs, &c. ...	" ...	1,352,470	1,358,055	5,585	...
Cereals, wheat ...	Quintals ...	786,337	1,066,628	331,291	...
" maize ...	" ...	295	766	471	...
" barley ...	" ...	501,197	678,979	177,782	...
" oats ...	" ...	362,384	199,496	...	162,888
Flour ...	" ...	18,090	8,825	...	9,265
Vegetables, green ...	Kilos. ...	5,374,724	3,666,095	...	1,708,629
" dry ...	" ...	3,827,620	4,680,407	852,787	...
Potatoes ...	" ...	4,217,012	2,906,284	...	1,310,728
Canary seed ...	" ...	222,492	214,790	...	7,702
Fruit, fresh ...	" ...	7,912,379	6,251,587	...	1,660,792
" dry ...	" ...	5,035,930	6,199,575	1,163,645	...
" oleaginous ...	" ...	154,370	63,695	...	90,675
Tobacco, leaf ...	" ...	3,152,292	2,586,221	...	566,071
" manufactured ...	" ...	241,530	195,660	...	50,870
Oil, olive ...	" ...	1,039,596	531,888	...	508,708
" seed ...	" ...	15,389	21,770	6,381	...
Flax, seed ...	" ...	853,262	552,422	...	300,840
" straw ...	" ...	19	...	...	19
" cleaned ...	" ...	59	...	...	59
Reeds ...	" ...	195,895	120,308	...	75,587
Alfa fibre ...	" ...	75,926,493	66,968,881	...	8,957,612
Dwarf palm leaves	" ...	3,410	666	...	2,744
Crin végétal ...	" ...	17,251,991	17,872,187	620,196	...
Cork ...	" ...	7,189,593	8,549,583	1,359,990	...
Tan bark ...	" ...	11,801,119	12,653,221	852,102	...
Forage ...	" ...	10,677,639	6,292,949	...	4,384,690
Rags ...	" ...	1,489,984	1,699,236	209,252	...
Lead ...	Quintals ...	202	8,688	8,486	...
Ore, iron ...	" ...	3,009,331	4,408,239	1,398,918	...
" copper ...	" ...	14,188	45,117	31,929	...
" lead ...	" ...	440,273	87,363	...	352,910
" zinc ...	" ...	119,566	116,399	...	3,167
Wines ...	Litres ...	132,340,436	164,255,162	31,914,726	...
Alcohol ...	" ...	832,792	1,147,770	264,978	...
Skins, dressed ...	Kilos. ...	101,555	289,267	187,712	...
Lard ...	" ...	172,369	161,438	...	10,931

IMPORTS during the Years 1888 and 1889.

Nature of Merchandise.	Units.	1888.	1889.	Increase.	Decrease.
Horses, asses, mules ...	Number ...	3,517	3,619	102	...
Cattle ...	...	66,759	88,599	22,840	...
Salt meat ...	...	850,821	967,099	106,278	...
Cheese ...	...	2,111,985	2,194,976	82,991	...
Butter ...	...	446,821	455,235	...	11,585
Lard ...	...	1,454,082	1,522,069	67,987	...
Hides, raw ...	...	442,743	456,796	14,053	...
Silk ...	...	26,684	17,795	...	8,889
Fish, salted ...	...	2,202,290	1,848,943	...	353,342
Cereals, wheat ...	Quintals ...	73,090	188,513	112,428	...
" maize ...	...	87,546	85,048	...	2,508
" barley ...	...	318,478	141,799	...	186,679
" oats ...	...	1,682	199	...	1,483
Flour ...	...	83,640	104,827	21,187	...
Rice ...	Kilos. ...	2,587,378	2,629,311	41,943	...
Potatoes ...	...	9,897,710	10,172,006	274,296	...
Vegetables, dry ...	...	3,976,588	4,790,989	814,401	...
Fruit, dry ...	...	1,864,042	2,106,768	242,724	...
" oleaginous ...	...	785,947	752,246	...	33,701
Glucose ...	...	106,322	129,403	23,081	...
Sugar, raw ...	...	1,465,332	1,578,166	112,844	...
" refined ...	...	12,615,187	12,265,459	...	349,728
Copper ...	...	4,081,053	3,798,641	...	282,412
Chicory ...	...	294,162	326,843	42,681	...
Tea ...	...	13,534	16,742	...	2,792
Pepper ...	...	245,483	254,905	29,422	...
Chestnuts... ..	...	841,289	788,894	...	42,395
Cinnamon and cassia ...	...	19,992	28,311	8,319	...
Nutmegs and mace ...	...	1,106	805	...	301
Cloves ...	...	28,579	40,507	1,928	...
Tobacco, leaf ...	...	1,277,170	1,118,516	...	168,654
" manufactured ...	...	198,646	184,708	...	9,928
Oil, olive ...	...	2,069,918	2,862,528	792,610	...
" seed ...	...	3,624,675	3,460,249	...	154,426
Timber, rough ...	1,000 kilos. ...	13,081	13,839	758	...
" sawn ...	...	88,874	30,910	...	7,964
Building material ...	Kilos. ...	76,752,319	79,546,642	2,794,323	...
Coal ...	Quintals ...	1,094,312	1,490,992	396,680	...
Petroleum, raw ...	Kilos. ...	31,749	61,493	29,744	...
" refined ...	...	5,479,705	4,789,569	...	690,136
Wine ...	Litres ...	12,523,943	10,399,394	...	2,124,549
Liqueurs ...	...	736,195	692,336	...	43,859
Alcohol ...	...	3,867,791	3,738,441	371,050	...
Beer ...	...	1,370,543	910,208	...	460,325
Pottery ...	Kilos. ...	3,113,342	1,904,060	...	1,209,282
Glass and crystal ...	...	2,906,492	3,248,753	342,261	...
Tissues, linen ...	...	483,649	443,306	...	40,243
" jute ...	...	1,380,788	2,322,867	942,079	...
" cotton ...	...	7,727,338	8,145,747	418,409	...
" woollen... ..	...	506,060	561,945	55,885	...
" silk ...	...	21,899	27,471	5,572	...
" others ...	...	25,854	23,022	...	2,832
Paper and cardboard ...	...	3,066,769	3,255,597	188,828	...
Skins, dressed ...	...	1,267,620	1,510,807	243,187	...
Machinery ...	...	2,755,268	2,589,478	...	205,810
Metal work ...	...	11,187,060	11,301,650	114,590	...
Sparterie ...	...	1,802,906	1,316,352	13,446	...

Fishery.

In the years immediately after the conquest great exertions were made to attract a maritime population to Algeria. Very few Frenchmen would venture so far from their own coasts and families, but the fishermen of other nations were not slow in availing themselves of this new opening. Spaniards flocked in considerable number to Oran, Italians to Algiers, and both Italians and Maltese to the ports of Constantine.

A few Arabs attempted to follow the example of the European fishermen, but the natives of the Barbary States have never manifested any predilection for such pursuits; they prefer to embark as sailors on board seagoing ships, or to act as boatmen in the various harbours of the colony. The European seagoing men showed no disposition to abandon their various nationalities, and up to 1880 the maritime population of the colony consisted of the following elements:—

	Per cent.
Italians	50
Natives, French and naturalised Frenchmen ..	30
Spaniards	15
Maltese	5

This state of affairs caused serious anxiety to the Algerian authorities, who desired, by every means in their power, to force foreigners residing in the colony to abandon their nationalities, and to accept naturalisation as French citizens with the accompanying obligation of compulsory military service.

On March 1, 1888, a law was passed prohibiting foreigners from engaging in the local fisheries; the result was to compel all fishermen, not of French origin, to abandon their nationality or to quit the colony.

Some Maltese adopted the latter alternative, but many were compelled, much against their will, to accept the former.

The following shows the number of persons amongst the seafaring population who became naturalised Frenchmen during the past four years:—

1885.. .. .	34
1886.. .. .	254
1887.. .. .	545
1888.. .. .	601

Nearly all the fish caught on the coast are consumed in the colony; about one-fifth are exported, and these only the species capable of being salted—the sardine, the anchovy, and the thunny. Various efforts have been made to send fresh fish to France by means of refrigeration, but they have all been renounced as unremunerative.

Coral fishery.

Coral fishery is a French monopoly, as nearly all the banks are within the three-mile limit. Since 1877 there has been a steady decrease in this industry. The value of the coral collected since that year is as follows:—

						France.
1877	..	..	..	..	..	2,311,950
1880	..	..	..	..	..	755,364
1885	..	..	..	..	..	512,692
1886	..	..	..	..	..	301,380
1887	..	..	..	..	..	265,290
1888	..	..	..	..	..	265,550

In 1877 263 boats, with crews aggregating 33,685 men, were employed, and in 1888 only 26 boats, with 5,111 men. This is owing in a great measure to the regulation which permits French boats to engage in the fishery without the payment of taxes, while foreigners have to pay annually from 400 to 800 fr. per boat, according to their nationality.

The new law of June 26, 1889, which declares that all foreigners born in French territory are considered French, unless, during the year that follows their majority, they demand to retain their original nationality, and that all children of parents themselves born in France are French without liberty of option, will greatly modify the condition of the population of Algeria.

Many young Maltese will lose, what they prize so much, British nationality, and will be compelled to perform military service, which, however, is of a much milder nature here than it is in France—being limited to one year.

The French Chambers adopted, on April 2, 1889, a law reserving the navigation between Algeria and France to vessels under the French flag. But so far it is inoperative, except for Powers like Italy, which have no favoured nation clauses in their conventions with France. Belgium and Spain have free navigation between France and Algeria, and this is accorded to Great Britain by the law of February 27, 1882.

The following is a statement of the arrivals of vessels of all nations at the various ports of Algeria during 1889 :—

At what Ports.	In Ballast.			In Cargo.		
	Number.	Tonnage.	Crews.	Number.	Tonnage.	Crews.
Algiers ...	39	11,041	497	1,202	903,070	40,729
Cherchell...	...	...	...	4	131	18
Ténès ...	...	...	...	11	295	75
Mostaganem ...	2	1,018	37	15	7,594	274
Arzew ...	17	7,915	241	37	14,480	566
Oran ...	125	55,579	1,777	891	476,840	20,844
Mers-el-Kebir ...	27	1,606	164	47	4,097	261
Beni-Saf ...	143	136,483	2,947	8	1,700	100
Nemours ...	48	10,997	741	10	379	84
Dellys ...	...	...	...	...	...	...
Bougie ...	5	2,435	67	24	13,067	505
Djidjelli ...	29	1,120	223	1	10	4
Philippeville ...	42	28,199	991	344	208,395	11,047
Stora ...	7	325	37	12	496	65
Collo ...	15	6,591	188	...	...	...
Bône ...	114	92,077	2,218	456	232,601	11,584
La Calle ...	44	10,943	474	73	27,384	2,038
Total ...	657	366,332	10,602	3,135	1,890,539	88,194
Total of both categories ...	...	...	...	3,792	2,256,871	98,796

Subjoined is another table showing the nationality and tonnage of all vessels which have arrived at ports where British Consular offices are stationed. It will be seen at a glance how greatly British interests exceed the aggregate of those of all other nations except France itself :—

ALGIERS.

29

Flag.	Algiers.		Oran.		Bône.		Philippeville.		Beni-Saf.	
	Number.	Tonnage.	Number.	Tonnage.	Number.	Tonnage.	Number.	Tonnage.	Number.	Tonnage.
French	752	587,007	485	358,304	383	214,687	299	124,875	9	3,618
Russian	1	318	1	369	3	1,046	..	..	..	..
Swedish	6	2,454	4	2,124	1	450	..	1,674	..	..
Norwegian	15	7,817	22	9,757	7	2,608	1	513	..	..
Danish	..	..	..	766	2	1,563	..	..	..	..
British	215	262,053	97	79,444	83	88,712	..	15,573	112	117,508
German	11	9,286	7	6,588	4	2,193	8	1,940	2	2,173
Dutch	..	1,915	1	611	1	904	1	592	3	3,065
Belgian	..	2,038	11	10,385	..	..	..	..	13	11,299
Portuguese	..	..	14	940	..	..	..	..	1	40
Spanish	172	25,321	348	51,957	8	2,133	36	7,248	11	482
Austrian	11	4,278	11	5,595	7	2,613	4	1,416	..	..
Italian	42	5,493	14	5,579	46	5,726	9	955	..	..
Greek	11	5,972	..	..	..	..	3	1,105	..	..
Turkish	1	160	..	..	..	715	3	1,173	..	..
Tunisian	..	..	..	..	22	328	4	50	..	..
Total	1,241	914,112	1,016	532,419	570	322,678	886	236,694	151	138,183

Progress of
Algeria.

The progress which Algeria has made during the past few years may be briefly summarised as follows:—Between 1881 and 1888 civil territory has increased in surface by 615,000 hectares, and in population by 527,000 souls. The receipts of the Treasury, which between 1875 and 1881 aggregated 194,000,000 fr., have reached, between 1882 and 1888, 256,000,000, or an increase of 32 per cent. in seven years.

The departmental budgets, which formerly could not be balanced without large subsidies from the State, showed at the beginning of 1889 an increase of ordinary receipts of more than 3,000,000. From 1882 to 1888 the receipts exceeded 46,000,000.

In 1881 the vine was cultivated over an area of 28,000 hectares, and the production was 288,000 hectolitres of wine. In 1888 the surface under vine culture was 103,000 hectares, and the produce was 2,800,000 hectolitres.

During the same period the number of the different kinds of animals has increased from 11,000,000 to 17,000,000.

The length of railway has extended from 1,235 kiloms. to 2,555 kiloms., and the receipts have augmented from 14,000,000 fr. to 20,000,000 fr.

The exports and imports, which aggregated 2,816,000,000 during the former period, have reached 3,191,000,000 in the latter, and the navigation has increased from 3,750,000 tons to 9,500,000 tons.

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NO. 671.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1889

ON THE

TRADE OF THE DISTRICT OF HAVRE.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 486.

Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1890.

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FRANCE.

HAVRE.

Consul-General Bernal to the Marquis of Salisbury.

My Lord,

February 28, 1890.

I HAVE the honour to enclose herewith my Report on the Trade, Commerce, Navigation, &c., of Havre, and the District of the Consulate-General for 1889.

I have, &c.

(Signed) FREDERIC BERNAL.

Report on the Trade, Commerce, and Navigation of Havre, and the district of the Consulate-General, including Reports from Her Majesty's Consul at Rouen, and the British Vice-Consuls at Caen, Trouville-Deauville, Honfleur, Fécamp, and Dieppe.

The year 1889 may be considered, on the whole, as having been a fairly good one for the commerce of Havre, for although during three or four months affairs became—on account probably of the exhibition—very slack, the months of November and December showed a great increase of business, especially in the imports of cotton, of which article, partly owing to the crop being an early one, and partly to manufacturers' stocks having run low, large arrivals took place. Speculative operations in coffee, through the Produce Clearing House, which now form so large a feature of the business done at Havre, were carried on to a very considerable extent, much of which was for outside account, but no failures of any known firms occurred, and the financial position of the town is considered very satisfactory. Owing to the goodness of the harvest the imports of wheat fell off considerably, shipping showing in consequence a decrease of 68,048 tons from 1888, which was, however, much less than happened at Rouen, where the arrivals were 193,400 tons below the previous year. Havre, however, still continues to be second on the list of French ports, the collective tonnage of entries and clearances, with cargo, of the first four being as follows: Marseilles, 6,499,421; Havre, 3,601,317; Bordeaux, 2,074,322; Dunkirk, 1,585,150. As I have so often pointed out, the high railway rates for the transport of cotton

General
observations.

from Havre to Alsace, Switzerland, and Southern Germany, as compared with those charged by the roads running from Bremen and Antwerp; and the cost, for want of direct communication with the north of France, of the carriage of wool, have prevented Havre from attaining the same development to which it would otherwise have reached, and its northern rivals have profited thereby. Thus the rates per ton of the transport of cotton to the nine principal manufacturing towns of Switzerland, are from Bremerhaven, 34 fr. 8 c.; from Antwerp, 38 fr. 48 c.; from Havre, 43 fr. 31 c.; while to the Vosges they are from Antwerp, 28 fr. 74 c.; and from Havre, 50 fr. 32 c. The Chamber of Commerce of Havre do all they can to induce the railroads to reduce these rates, and a reduction in the tariff to Switzerland is about to take place. As regards wool, the case is even worse; the imports into Havre decreasing year by year, while Dunkirk, which formerly had none, received last year 156,657 bales from the River Plate.

Further projected railroads.

The projected railroad to the north of France, *via* Dieppe, and the one to the west, with a tunnel under the Seine, still remain in the clouds, with no prospect whatever of any immediate execution. Both of these lines would be of immense advantage to this port if constructed at once, but will be much less so if they are delayed until trade has gone into other channels.

The proposed improvements of the Port of Havre, and of the River Seine.

After long years of delay, during which numerous plans were brought forward and discussed, and many commissions, scientific, technical, and administrative, came, examined, and arrived at no very definite conclusions, a project—described in my reports for former years—which might be called a compromise of the opposing interests of Havre and Rouen, as well as of the rival ideas of engineers and experts, was arrived at, for more perfectly embanking and deepening the River Seine, at a cost of 23,000,000 fr. (920,000*l.*), and for improving the approaches, and making a new entry to the port of Havre, at an expense of 73,000,000 fr. (2,920,000*l.*) Towards this total sum of 3,840,000*l.* the Chambers of Commerce, and the Municipalities of Havre and Rouen, undertook to contribute 960,000*l.*, or 25 per cent. of the entire cost. Supported by the government, and by the Commission to whom it had been referred, the project passed the Chamber of Deputies on January 24, 1889, by a vote of 310 to 157. On June 29, the Bill came up for discussion before the Senate, when an amendment proposed by Monsieur Teisserenc de Bort to the effect that the cost of the improvements should be met by a fresh tonnage duty, and by supplementary taxes on all goods and merchandise imported for consumption, was carried by 149 to 98 votes. Further discussion was adjourned until the Commission should have examined and reported on this amendment. As soon as the result was known, the Municipality, and the Chamber of Commerce of Havre, protested in the strongest terms against the proposition, and the latter body refused to contribute one penny to a plan which would have the most prejudicial consequences to the port. The Session ended without the question being again brought forward,

but on January 23 of this year, it once more came up, when the Commission again presented the original project, and on a motion of Monsieur Buffet to the effect that, in not reporting on the amendment, the Commission had not fulfilled the duty imposed on them, the adjournment of the project was voted by 126 to 70, a decision which appears tantamount to an indefinite postponement of the improvements. What are the real reasons which have induced certain prominent Statesmen to bring about this rejection it is impossible to say (the local Press did not hesitate on the first occasion to insinuate that it was the interests of the Northern Railway of France, rather than those of the Treasury, which it was sought to protect), but it only needs an elementary knowledge of the result of high duties and charges to clearly foresee that the imposition of extra customs duties on merchandize imported at Havre and Rouen, from which other ports are exempt, must inevitably operate to the most serious disadvantage of the two above-named ports, in the prosperity of which, and more especially in that of Havre, the whole country is interested. The injustice of the proposal is further heightened by the fact that while the three ports of Calais, Boulogne, and Dunkirk—whose total combined entries of shipping are inferior in tonnage to those of Havre—on a total expenditure on public works of 5,375,000*l.* have only contributed 700,000*l.*, or 13 per cent., Havre towards a sum already expended of 2,640,000*l.* has given 832,000*l.* or 32 per cent., while it offers to pay 25 per cent. of the cost of the new projected improvements. In face of the support given to these proposed new works by the leading public bodies, it may seem bold on my part to question their paramount necessity, and it is only from observations formed during a long residence here, and from the fact that many experienced persons hold the same opinions, that I venture to do so. I regret to have to say so, but I fear the port of Havre is not destined to see its trade increase to any great extent in the future, and that it can only hope to keep it at about its present level. It is quite certain that it will fall off very considerably if the protectionist party carry out their ideas and aims when the commercial treaties expire in 1892. If 25, or 30 years ago the government, and those who were then charged with the administration of the port, had been farseeing enough to look ahead, it might have been made, at a comparatively small expense, a port which would have competed on equal terms with, and have had nothing to fear from any competitor to the north of it. But the opportunity was lost, the improvements carried out were made piecemeal, nothing was done to give it cheap and competing communication with the east of France, and adjoining countries, so that it finds itself to-day with only one line of railroad to the interior, and hampered by charges which compare unfavourably with those of some of its competitors. Under these circumstances it would seem that, having quite sufficient dock accommodation for its present, and I believe, any future wants, the aim should be to continue to do everything to establish the most perfect appliances for the rapid discharge of cargoes; to do nothing to

increase, if they cannot be diminished, the charges on shipping; and above all, by constant and thorough dredging operations, to well deepen and maintain the present entrance and approaches to the port. This plan, which would cost not a tithe of the larger project, could only be carried out on condition that the embankments of the River Seine were not prolonged, and considering that steamers drawing over 21 feet are now frequently going up to Rouen, that port would not have much to complain of. But if ever the embankments are prolonged, it will at once become necessary to provide Havre with a new entry, since it is quite impossible for anyone to say where the millions of cubic yards of mud, sand, and stones, which now form the various shifting banks at the mouth of the river, would be driven to by the increased current, or whether they would not at once block up the present not too satisfactory channel to the port.

Works
finished, or in
progress.

The two new dry docks mentioned in my report of last year have been finished. Two more sheds for merchandise have been erected, making a total number of 16, with a covered space of 64,000 square yards: and several additional hydraulic cranes have been put up, or are in course of erection. Outside the port, little more than the annual necessary dredging operations have been carried on, although a commencement has been made on the banks adjoining the channel leading to the harbour.

The Tancarville canal.

The depth of water—19 feet 6 inches for the first mile and three-quarters, and 11 feet 4 inches, for the rest of the distance—has been kept up in the Canal de Tancarville, and 312,822 tons of merchandise have been taken up and brought down, or 20,696 tons more than in 1888. They comprised grain, dyewoods, timber, wine, cotton, and petroleum, among those going from, and building materials, agricultural, and metallurgical productions, coals, &c., among those coming down to Havre.

State of the
River Seine.

No change has taken place in the state of the lower part of the river since my last report, except that the channel, at the entrance, has suddenly shifted from the south to the north of the Ratier bank, and has, for the time being, a depth of 27 feet at spring tides.

Commercial
aspect of the
election of
deputies from
the district of
Havre.

The election of deputies to the Chamber, which took place last September, and resulted in the return of the two former members for the district of Havre, presented no features of interest in a commercial point of view, save that the senior deputy, in returning thanks to his electors, gave utterance to a strong Protectionist note, more particularly in regard to the necessity of prolonging and strengthening on a sure basis the system of bounties on ship-building and navigation, which otherwise would come to an end on January 30, 1891. This is quite in accordance with the widespread Protectionist wave of public outcry, which seems to have submerged, at least, for a time, free traders of every degree and category throughout the country, and which, if it meets with no opposition powerful enough to control and check its course, will inevitably bring about a state of things from which the commerce and port of Havre will be among the first to suffer severely.

I may mention, as an amusing incident of the subject, that this Protectionist tendency has already spread so far in this town that a majority was found in the Municipal Council to pass a resolution calling on the mayor to use his influence to induce the manager of the theatre, who is the tenant of the town, to dismiss two members of the orchestra, who are foreigners, and to replace them by native artists.

The question of the prolongation, or not, for a further term of years, of the law-giving bounties on the construction and navigation of vessels, which, as I mentioned above, will expire on January 30, 1891, excites very great interest. I have observed that people in England are very apt to confound the two classes of bounties, and to conclude that because those given on the construction of ships have not produced much effect, that therefore the others have likewise proved a failure. But this is not so. Our building yards being able to construct vessels at a lower rate, and more rapidly than those in France, many French shipowners have found it to be an advantage to purchase vessels from us, although by doing so they lose one-half of the navigation bounty. To counteract this, many persons propose that in the new law bounties shall be only given to vessels built in France. The cost to the country is about 10,000,000 fr.—400,000*l.* per annum, and the results are, that while in 1879 France had only 599 steamers, of 255,959 tons, the number had increased in 1888 to 1,015, of 509,800 tons. In 1880, Havre had 183 sailing vessels, of 48,548 tons, and 103 steamers, of 62,009 tons; together, 286 vessels, of 110,557 tons. In 1889, the numbers were—83 of 55,687 tons, and 138 of 158,215 tons, or together, 221 vessels, of 213,902 tons. From this increase, however, must be deducted that which has taken place in the number and tonnage of the steamers belonging to the large maritime postal companies, who receive subventions from the Government, but do not share in the navigation bounties. Whether these results are worth their cost to the country at large is a matter of appreciation, but looking at the good dividends paid by the Company des Chargeurs Réunis, whose fleet of 27 steamers (of which 24 were built in France), of some 69,000 tons, sail from this port, it may fairly be asked whether the French shipowner is not well able to stand alone unsupported by Government bounties.

In a constant supply of disciplined seamen, who do not give a tithe of the trouble to their captains which ours so frequently do, and whose wages are a good deal lower than on board our vessels, the French shipowner possesses a decided advantage. Thus, while our A.B.'s are paid 4*l.* 5*s.* per month on steamers, and 3*l.* on sailing vessels, the French sailor only gets 2*l.* 16*s.* and 2*l.* 8*s.*; and as against the 4*l.* 10*s.* and 3*l.* 5*s.* earned by our firemen and trimmers, the pay is 3*l.* 12*s.* and 2*l.* 16*s.* The French captains, mates, and engineers, are, on the other hand, rather better paid than ours, and while we only give 4*l.* 15*s.* or 5*l.* to a cook on an ordinary long voyage steamer, the French pay is 8*l.* A carpenter, however, who is paid 5*l.* 10*s.* to 5*l.* 15*s.* on board a British vessel, only gets 2*l.* 16*s.* to 3*l.* 12*s.* on board a French one.

Rates of wages, &c., paid to French seamen.

Special law cases.

The only law case of importance to British shipowners decided last year was one where the Tribunal of Commerce decided that a clause in a bill of lading, to the effect that a vessel had the right to discharge day and night, and to stow the goods on the quay, or under a shed, without giving previous notice to the consignee before weighing, when that was to be done at the ship's expense; and that all the risk and expense was to be borne by the consignee, notwithstanding any custom or regulation of the port to the contrary; was a perfectly valid one, and binding on the receiver of the goods.

The "Caisse de Liquidation."

From one source and another, the "Caisse de Liquidation," or produce clearing house, had a most successful winding-up of the seventh year of its existence on September 30 last, the net profits for the twelve months showing a surplus of 102½ per cent. Only a portion of this was distributed in cash, the greater amount being invested, and the shares, on which only 50 per cent. had been paid up, being credited with the sum thus put aside to fructify.

Condition of the labouring classes.

A considerable amount of distress has existed throughout last year among certain categories of the working classes, and chiefly among those employed in the shipbuilding yards, and the floating population, which finds work about the docks, the latter being, I am told, but too often a very improvident class of men, who give no thought to to-morrow. I was much struck to read in the English papers a statement that Mr. Potter had said, as one of the deputation of English workmen who attended the Paris Exhibition, that he thought, on the whole, French workmen are better off than the industrial classes in England, and that the deputation did not see a drunkard, or a beggar, during their stay in Paris. He would see too many of the latter here, and I think, after a comparison of the prices of provisions, groceries, &c., in this town, with those at which similar articles can be bought in the United Kingdom, he would change the first part of his opinion. The advantage the French workmen has over his British colleague is, that the former, even in the case of equally steady men, will get more amusement out of a less expenditure of money; and that the greater number of French women can make a savoury tasting soup, or dish, out of comparatively nothing, which hardly any English working-class woman knows how to do.

The dock labourers and their wages.

The dock labourers of Havre, who come in from all parts of the country, and especially from Brittany, receive—the foremen, 6 fr., and the men, 5 fr. a-day. No man is taken for less than half-a-day, and if kept after 12 P.M. is entitled to a day's pay. If wanted after knocking-off time, 7½d. an hour is paid him. Night work is paid as day work, four hours counting as half-a-day; but a whole night is paid as a day and a half. Working hours vary according to the season of the year. After deducting half-an-hour for breakfast, and two hours, 12 till 2, for dinner; they range from seven-and-a-half in the winter, to nine-and-a-half in the summer months.

Wages in other trades.

The wages paid in some of the other trades are as follows:—Masons and bricklayers, 6d.; their helps, 3½d. an hour. Locksmiths, blacksmiths, painters, 6d., joiners, 5½d. to 6d., house-

carpenters, $6\frac{1}{2}d.$, slaters, $7d.$, workers in metal, $6d.$ to $7d.$ an hour. Coopers, 6 fr. ($4s. 10d.$), and ship-carpenters, 8 fr. ($6s. 5d.$) a day. The hours of labour are about 10 in the summer, and 9 in the winter months. The rents paid by workmen range from 6*l.* to 10*l.* a year.

The wages of bakers are, for a first class hand, from 80 fr. to 90 fr. ($3*l.* 4s.$, to $3*l.* 12s.$), and for a second-class man from 50 fr. to 60 fr. ($2*l.* to 2*l.* 8s.$) a month, with board. The working hours are generally from 1 a.m. to 1 p.m., and even longer. The price of ordinary household bread is, 1 fr. 10 c. (say $10\frac{1}{2}d.$) the loaf of 3 kilos. (6 lbs. $9\frac{3}{4}$ ozs.).

No strikes of any kind occurred last year.

Wages of
bakers, and
price of bread
Strikes.
Agriculture.

Taken as a whole the harvest in 1889 was a fairly good one, wheat, rye, barley, hay, and green crops having turned out well; but potatoes and oats were under the average, and the apple crop was a failure. Low prices here, as in England, give rise to unceasing complaints from the farmers, who can hardly keep their heads above water, nor do they always get the whole benefit of the duty of 5 fr. per 100 kilos. ($8s. 8d.$ per quarter of 480 lbs.), the price of Californian wheat having been towards the end of the year about one-third of the duty higher in England than it would have fetched here.

The average size of farms in this department is between 75 to 100 acres; the rent about 32*s.*, and the taxes, which are generally paid by the tenant in addition to his rent, about 5*s.* an acre. The labourers who live and are boarded on the farm are paid, the men from 12*l.* to 20*l.*, and the women from 6*l.* to 12*l.* a year. From spring to the month of November, about one-third more additional hands are taken on, who receive, the men at the rate of from 20*l.* to 24*l.*, and the women from 12*l.* to 16*l.* per annum, without food.

Very little is now heard on this subject, the prosecutions which have taken place, and the outcry which was made, having rendered farmers and dealers very cautious in their use of margarine; but I am told the practice is still followed, but that 10 per cent. of the latter—or even a little more—can be so artistically mixed with the pure article as to defy detection. The absence of epidemic diseases among human beings, which was the rule in 1889, appears to have extended to animals. Out of 82,026 horses which are registered in the department of the Seine Inférieure, only 14 were found attacked by glanders, and killed in consequence. In the months of May, June, July, and August, some cases of foot and mouth disease occurred in the arrondissements of Havre, Rouen, Yvetot, Dieppe, and Neufchâtel, and 48 cases of tuberculosis in cattle were treated. Rabies was also frequently reported from various points in the department, as has unfortunately been the case for some years past. In the departments of the Eure, the Orne, and of Calvados, the sanitary condition of the cattle was, I learn, very good.

Falsification
of butter.

Diseases of
horses, cattle,
&c.

38,665 emigrants embarked at Havre last year against 38,525 in 1888. Of this number 10,745 were French, 9,414 Italians

Emigration.

Passengers carried by Transatlantic Company.	7,796 Swiss, 2,951 from Alsace-Lorraine, and 2,749 Germans. 36,944 went to the United States, and 11,728 to the Argentine Republic. The steamers of the Compagnie Générale Transatlantique, in their 52 voyages from Havre to New York, carried 33,228 passengers, of whom 9,835 were first class.
British trade.	No increase of our trade can be expected under the pressure of the duties now existing, and the future prospect in view of the outcry against the present Commercial Treaties is not an encouraging one. I read several articles which appeared in our papers last year on an alleged falling-off, since 1877, of some 7,500,000 <i>l.</i> in the value of the exports from France to Great Britain, and conclusions were drawn which are
Alleged decrease of French exports to Great Britain.	founded, in my judgment, on an erroneous basis. Were it possible to verify the facts, I think that the causes of a large portion of this falling off would be found to be threefold, viz., in a certain degree, the shrinkage in values; but principally the great decrease in the export of goods to England in transit for foreign countries (whereby a considerable loss has been suffered by our shipping interests), which arises partly from the increased number of French and other steamers, going direct to those countries, and partly from the extreme strictness with which, in connection with this transit trade, the provisions of the Merchandise Marks Act have been carried out by our Customs' Authorities. As regards the second of the two above-named causes, the steamers of "La Compagnie Générale Transatlantique" running to New York, are much larger, and carry considerably more cargo than they used to do, while the German steamers touching here, bound to that port, also take goods which formerly went via Liverpool. The former of these two companies has also now a line from here to the West Indies, taking cargo, much of which formerly was sent via Southampton. In addition to these, and which did not exist a few years back, the Bossière line takes about 200 tons per month, during the season, to Canada; the "Compañia Transatlantica," to the Havannah and Vera Cruz, 700 or 800 tons measurement per month; and the "Compagnie Maritime du Pacifique," which 2 or 3 years ago loaded only about 600 tons per month, now takes from 900 to 1,000 tons every 18 days. There are other lines either doing a new, or increased trade, and large and important quantities of rough cargo have also been exported from France in recent years via Antwerp. All these new, or increased outlets of communication between France and foreign countries have seriously diminished its export transit trade with England.
Suggestion of partial causes thereof.	
Increased direct communications between France and foreign countries.	
Severity with which our custom-house apply the Merchandise Marks Act to goods in transit.	As regards the severity with which our custom-house interprets the Merchandise Marks Act in connection with goods in transit through England, many instances have been given me, among them are such cases as goods sent from here, detained because they bore labels having printed on them, "the latest novelty;" "12 yards net;" "best bent steel needles." In another case a merchant in a British colony ordered from a Paris firm, a number of small india-rubber balloons, with his name, and the words

"Compliments of the Season," printed on them. These goods, on passing through England in transit, for transportation on a British steamer, were seized and confiscated. The result has been to divert the shipments of an important merchant to French steamers.

Complaints are also made respecting the statistical details required in regard to goods in transit, many of which details the forwarding agents here are unable, very often, to furnish. This leads to delays, fines, and a determination to send no more shipments to England in transit for foreign countries. My informants are in fact unanimous in their opinions that if the present difficulties, delays, and vexations, continue the present transit trade to England will be practically killed, to the detriment of our ship-owners, and of the numerous interests connected with them.

Complaints as to statistics required by our custom-house.

An article appeared last year in the *Journal du Havre*, which, taking for its text the running of an additional boat—on Saturdays—between Southampton and Havre, during the summer season, took the London and South-Western Railway Company to task for its want of enterprise in not establishing a daily communication between the two ports. This lecture would have been much more to the point had it been addressed to the proper quarter, namely, the Western Railway Company of France, who, having a joint interest with the London, Brighton, and South Coast Railway Company in the steamers running between Newhaven and Dieppe, naturally do everything in their power to favour and attract passengers and goods to that route rather than to the one via Havre.

Newspaper criticism of the Steamboat Service between Southampton and Havre.

With regard to the line of steamers between Southampton and this port, the two regular boats leave nothing to be desired as far as their sea-going qualities are concerned, nor in respect of the regularity of their passages; and they are commanded by two excellent and very popular captains. New vessels, with more recent appliances and comforts, and with fewer stamping horses on the decks hence to Southampton (of which I have heard many complaints), would doubtless be appreciated by passengers, and these improvements, together with additional services, would probably be furnished by the Company, did the Western Railway of France do its part to provide, and attract, the necessary elements to support them.

RETURN of all Shipping entered at the Port of Havre in 1889.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	94	42,662	825	647,427	919	690,089
" packets ...	...	...	176	56,253	176	56,253
French ...	113	81,753	524	714,769	637	796,521
Russian ...	22	9,227	...	...	22	9,227
Swedish ...	16	5,518	60	32,380	76	37,898
Norwegian ...	92	37,215	45	27,788	137	65,003
Danish ...	54	8,572	36	24,140	90	32,712
German ...	50	26,679	219	342,267	269	368,946
Dutch ...	10	2,800	104	56,250	114	59,050
Belgian ...	...	...	3	582	3	582
Portuguese...	1	333	16	7,825	17	8,158
Spanish ...	...	...	82	107,805	82	107,805
Austrian ...	3	1,200	...	...	3	1,200
Italian ...	9	5,026	...	...	9	5,026
American ...	20	34,375	...	...	20	31,375
Haytian ...	1	396	...	...	1	296
Argentine ...	1	374	...	...	1	374
Total ...	491	256,130	2,100	2,017,485	2,591	2,273,615
Coasting trade (French) ...	...	...	...	...	3,656	553,337
Grand total ...	491	256,130	2,100	2,017,485	6,247	2,827,312

Details of shipping.

British shipping shows a decrease of 80,581 tons; the direct trade having fallen-off 52,264 tons, and the indirect, 28,317 tons. Various causes, including a shrinkage in the number of tons of coal brought by British vessels, produced the falling-off in the first instance, while the second is accounted for by the smaller number of wheat-laden vessels from Russia and Roumania. French shipping increased 17,000 tons; Danish, 7,000 tons; Dutch, 23,550 tons; Portuguese, 2,700 tons; American, 14,000 tons. On the other hand, Swedish decreased 4,800 tons; Norwegian, 9,000 tons; German, 20,000 tons; Spanish, 2,000 tons; Austrian, 2,700 tons; Italian, 8,600 tons; Greek, 2,300 tons. After striking a balance between the increase and decrease of the respective flags, the total entries for 1889 are 68,048 tons less than in 1888.

British shipping.

Of the 919 British vessels which entered, 240, of 260,919 registered tons, were in the indirect trade, against 301, of 289,236 tons, in 1888; 293,318 and 92,966 bales of cotton were brought in British vessels from the United States and India, being respectively 164,268 and 51,142 bales more than in 1888; 456,215 tons of coal were imported in British bottoms, which show a decrease of 34,000 tons from the previous year.

On several lines of trade entries of British shipping at Havre show a falling-off of late years. From the Pacific coast it is now quite rare for us to have a vessel arrive. Although we still have two lines of steamers touching here to and from the northern ports of Brazil, the number of vessels which come here from the southern ones, or from the River Plate, is very few, and although the exports to that region are very large, no British ships take part in it, with the exception of a few steamers of the Allan line, chartered in the winter months by the "Chargeurs Réunis,"

which Company has, so to speak, a monopoly of the trade. Then, as regards sugar from Java, hides, dyewoods, &c., the purchase by foreigners of so many of our sailing vessels, and the transfer to foreign flags of a number of them—still owned by British subjects—for the purpose of escaping from our laws and regulations, has taken most of this business from us. We have lately had an English-built steamer, laden with coals, arrive here under the Dutch flag, commanded by an Englishman, and with a crew of British seamen. It seems strange, considering that the restrictions from which escape is sought were established in the interests of our seamen, that they appear not to hesitate to serve under other flags where they are deprived of the benefits of them. The disappearance of a class of handy sailing vessels, ranging from 300 tons upwards, is, I think, a national loss. Many of them belonged to minor British ports, and were manned by local crews, whom I generally remarked were sober, well conducted men. These vessels were capital schools of seamanship, where many steady lads, entering before the mast, could learn their profession, and rise to command vessels in their turn. With them have disappeared these opportunities, for, to-day, a young fellow who has to work his way upwards from the bottom, can learn very little by shipping on a “tramp,” or even on a regular line of steamers.

1,081 seamen, of whom 385, or about 36 per cent., were British seamen, foreigners, were discharged, 1,055 shipped, and 39 reported as deserters, at the Consulate-General during the past year, and 195 seamen's money orders, for 2,771*l.*, were issued.

With the decrease of sailing vessels fewer crews are now discharged at the Consulate-General. Steamers remain so short a time in port, and go as a rule direct to the United Kingdom, that they keep their men by them. But I am sorry to say I hear little cessation of the complaints made by masters, of the trouble and annoyance caused them by the bad conduct of too many of our seamen, and of their preference in consequence for foreign sailors, a preference which they too often give effect to. If the Seamen's Union is really honest in its professed desire to improve the condition of its members, it will take serious steps to check and punish acts of misconduct on their part, and it would be well if some of the public sympathy which is deservedly given to the sailor, was extended to the unfortunate captains (although I know there are some black sheep among them), who too frequently, in addition to all the responsibilities they have to bear, find their lives made a burden to them by the outrageous behaviour of some of their crew. Less laxity, and greater justice in the giving of characters, and the establishment of the long advocated system of continuous discharges, supplemented by consular conventions, would go far to bring about an improved condition of affairs. In the French Merchant Navy things are managed very differently, and I have just seen the text of the proposed reformed code of discipline, which is now before the Chamber. In it every kind of offence on the part of captain, officer, sailor, or passenger, is

foreseen, and its trial and punishment provided for. Among them are included disobedience to orders from, or outrage by words, gestures, or menaces to consular officers in the exercise of their duty, so that we, who are so continually the subject of these latter, will have still additional reason to envy the protection and support given, on this and other points, to our French colleagues by their Government.

“ At the master’s option.”

As I have on former occasions pointed out, the question is constantly arising as to what is meant by the words in articles of agreement, “and back to a final port of discharge in the United Kingdom, or Continent of Europe,” the men claiming one thing, the master the other, and both sides being very dissatisfied that the consular officer does not give a decided answer on the subject. I have never been able to obtain an authoritative decision on the matter, but the question could never arise if the sentence was always followed by the addition of the words “at the master’s option.”

Trade and commerce. Imports, &c., of cotton.

IMPORTS, Deliveries, and Stocks of Cotton at Havre, in the Years 1888-89.

Countries.	1889.			1888.		
	Imports.	Deliveries.	Stocks, Dec. 31, 1889.	Imports.	Deliveries.	Stocks, Dec. 31, 1888.
United States B.	Bales. 498,642	477,459	105,837	413,549	408,693	84,648
Brazil " " "	959	2,589	370	3,097	5,603	2,000
India " " "	128,472	126,569	28,366	53,725	119,868	26,463
Other countries " " "	19,665	19,999	2,659	19,118	22,468	2,993
Total " " "	647,738	626,610	137,232	489,489	556,632	116,104

General im- ports.

RETURN of the Principal Articles of Import at Havre, during the Years 1888-89.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Sugar " " " " "	Tons " " "	" " "	Values are not taken by Havre Custom-house.	" " "	Values are not taken by Havre Custom-house.
French colonial " " " "	" " " "	5,131		6,510	
Foreign cane " " " "	" " " "	2,411		742	
" " beetroot " " " "	" " " "	10,386		10,611	
Cocoa " " " " "	" " " "	919		695	
Coffee " " " " "	" " " "	84,841		83,306	
Coals " " " " "	" " " "	495,422		539,687	
Cotton " " " " "	" " " "	117,673		97,349	
Dyewoods " " " " "	" " " "	69,564		91,598	
Hides " " " " "	" " " "	22,073		20,382	
Petroleum " " " " "	" " " "	25,282		19,406	
Rice " " " " "	" " " "	5,483		5,301	
Pig iron " " " " "	" " " "	1,214		4,204	
Cast " " " " "	" " " "	3,458		2,714	
Steel " " " " "	" " " "	364		830	
Metal goods " " " " "	" " " "	2,013		2,210	
Wheat " " " " "	" " " "	153,011		105,492	
Wool " " " " "	" " " "	8,836		14,110	
Palm oil " " " " "	" " " "	12,798		13,722	
Total " " " " "	" " " "	1,020,819		1,018,002	
Alcohol " " " " "	Gallons " " "	708,304		703,741	

RETURN of the Principal Articles of Export from Havre during the Years 1888-89. General ex-ports.

Articles.			1889.		1888.	
			Quantity.	Value.	Quantity.	Value.
Silks and ribbons	...	Tons	1,351	Values not obtainable.	1,207	Values not obtainable.
Woolen tissues	...	"	7,318		8,449	
Cotton	...	"	8,701		8,166	
China ware	...	"	1,419		1,525	
Paper, coloured	...	"	594		600	
" white	...	"	3,075		2,851	
Eggs	...	"	693		4	
Potatoes	...	"	9,167		6,730	
Ochre	...	"	1,392		1,290	
Salt butter	...	"	4,361		4,091	
Rags	...	"	44		285	
Total	...		38,118		35,209	
Millinery	...	Yards	7,543,387	Values not obtainable.	6,981,325	Values not obtainable.
Wine	...	Gallons	1,568,534		1,525,650	

The imports of French colonial sugar showed a considerable decrease, which can be attributed to increased quantities now sent from Martinique and Guadeloupe to the United States. On the other hand, those of foreign production increased, the high prices ruling having brought two or three floating cargoes here.

The imports of coffee showed a small increase over those of the preceding year, and under the influence of contradictory reports, large speculations took place in the article, the price of Santos falling to 85 fr. the 50 kilos. at the end of June, and rising to 107 fr. towards the latter part of December. The stocks, which were 364,316 bags on January 1, rose to 396,153 on December 31, 1889.

An increase of 20 per cent. in the imports of cotton, had for its origin that manufacturers' stocks had on the one hand run low, and on the other, that the crop of 1889-90 came early to hand.

The large falling off in the imports of coal was caused by the strikes, and rise in price in England, which led French manufacturers, &c., to send a good many orders to French collieries.

The large decrease in the quantity of dyewoods imported, must be put down to the disturbed state of the Island of Hayti, and to the great difficulty of transport from the interior where the wood is now procured. Thus fustic showed a decrease of 11,500 tons. It must also be noted that three Havre manufacturers have erected works at Riga for extracting dyes, and that they receive the raw material there direct.

The hopes founded on the slight increase in the arrivals of wool in 1888 were not realized, and the imports last year fell off nearly 40 per cent. Dunkirk is now the great port of reception for the article, the Northern Railway Company being able (which is not the case with the Western Railway Company), to make any tariff of transport it likes. It therefore does everything it can to attract goods to ports with which its line is connected, while, as I have so often pointed out, the unfortunate port of Havre is

cramped on all sides by having only one high tariffed line to do its transport to the interior.

Wheat.

The great increase in the imports of wheat took place in the beginning of the year, the good harvest in France and the high prices abroad having put a stop to any further arrivals since then.

Palm oil.

Imports of palm oil fell off again. This is another article of which the trade here is checked by the heavy transport rates.

Exports.

As regards the exports, there are no changes of any importance, woollen tissues and chinaware being the only two articles which show a falling-off.

Customs receipts.

The receipts from the customs, including the navigation dues, 1,545,573 fr., statistical dues, 733,996 fr., and the tax on salt, 153,762 fr., amounted to 55,803,417 fr. (2,232,136*l.*), against 53,142,402 fr. (2,125,696*l.*) in 1888, and 47,403,677 fr. (1,899,747*l.*) in 1887.

Shipbuilding.

Shipbuilding has not been very brisk during the past year. "La Société des Forges et Chantiers de la Méditerranée" launched a cargo-boat of 3,000 tons for Messageries Maritimes, and four small craft, and they commenced building two ironclads of 4,000 tons each for the Greek Government, seven torpedo boats for the French Government, and seven small vessels. The number of men employed in their building yards varied from 800 to 1,600. Their machine shops and cannon foundry were also very well employed.

At the Normand Building Yard three torpedo-boats were launched for the Government, and seven more commenced. About 400 men were employed.

Gun factory.

At the gun factory of the "Forges et Chantiers de la Méditerranée" 200 men were employed, and the following work was in course of execution, or finished during the year: For the French Government, 30 cannon of 32 centims., 2 of 15, 2 of 12, 1 of 10, 1 mortar, and 1 howitzer of 15, and over 10,000 shot and shell; for the Greek Government, 9 cannon of 27 centims., 15 of 15, and about 2,000 shot and shell; for the Spanish Government, 3 cannon of 12 centims.; for the Chilian Government, 4 cannon of 24 centims., 8 of 15, and 12 of 12; for the Japanese Government, 2 cannon of 32 centims., 2 of 27, and 1 of 24. A considerable number of smaller guns were also made.

Machinery.

At the machine shops, where 1,200 men were employed, large quantities of gun carriages, steam-engine, boilers, and various kinds of machinery were turned out.

Local industries.

The other local industries mentioned in my last year's Report were in full work.

The flour mill belonging to the "Compagnie des grands Moulins de Corbeil" was in full work, employing 120 men, and turning out 1,000 sacks of 220 lbs. per day.

Special yacht basin.

The creation of a special basin for yachts, for whose use the western half of the Bassin du Commerce, opposite the theatre, is now reserved, is a great success. Not only was it much used by them during the summer, but a number of them have laid up there during the winter, and have given a good deal of employ-

ment to engineers, ship carpenters, painters, &c. It is a pity that the surface of the water at the corners cannot be cleaned every day during the yachting season, but the Engineers of the Ponts et Chaussées, who have the management of the docks, say they have no funds they could use for that purpose, although the expense would be trifling.

The octroi dues, or town tax on articles of consumption, Octroi dues. produced 3,567,682 fr. (142,703*l.*), against 3,761,353 fr. in 1888.

The public health was extremely good in 1889, as is seen by Statistics of the population of Havre. the number of deaths, which were 2,982, as against 3,957 in 1888. No epidemics occurred, and the deaths from typhoid fever, which were 409 in 1887, and 288 in 1888, fell to very much fewer last year. The number of births were 3,730, of which 494 were illegitimate; 1,018 marriages took place, and 49 divorces; 92 of the marriages were the cause of 126 children becoming legitimate. The death-rate per 1,000 at the different ports in the district of Death-rate at ports in district of Consulate-General. the Consulate-General was:—Havre, 26·7 (35·3 in 1888); Rouen, 32 (34·9); Caen, 27 (31); Honfleur, 25 (28·7); Trouville-Deauville, 26·5 (24·3); Fécamp, 22 (22·5); and Dieppe, 30 (34·4).

The total entries of British shipping—excluding the regular Total entries of British shipping in district of Consulate-General. passenger steamers of the London and South-Western, and London, Brighton, and South Coast Railway Companies—at the Ports of Havre, Rouen, Caen, Honfleur, Trouville, Deauville, Fécamp, Dieppe, and their respective districts, were 3,087 vessels, of 1,512,985 registered tons. The passenger steamers, not included in the above, at Havre, Honfleur, and Dieppe, were 1,109, of 283,226 tons.

ROUEN.

Mr. Consul Percy Chapman reports as follows:—

An improvement in most of the industries, a good harvest, and General remarks. consequently a falling-off in the shipping, sums up in a few words the state of this district during the year.

The question of subjecting maize to a customs duty is the all-important one at present, as on it depends the continued arrivals of ships laden with this grain (one of the principal articles of import), the working of three distilleries, and the occupations of a considerable number of persons employed in the discharging, carting, and distilling the maize, not to mention the benefit to the coal trade, which would discontinue should these establishments cease to function. The matter is now being pleaded by both sides before the committee of 55 appointed by the Chamber of Deputies to report on these questions, and the existing treaties of commerce. The growers of beet are the enemy, as the growers of Indian corn in France, it would appear, do not ask for a duty, and as the alcohol distilled from maize has always been sold at a higher price than that distilled from beet, the partisans of the maize distilleries maintain that they do not cause a fall in price in alcohol from other productions. A distiller here, who is also a merchant, received during the year over 100,000 tons of grain, 90 per cent.

of which was maize; this will give an idea of the importance of this question to the port of Rouen.

The manufacturers here have succeeded in having the customs regulations in Indo-China altered in their favour from November 30, last. Previous to that date, all manufactured goods from foreign countries, having paid duty in France, were treated as French goods, the result being that buyers in Saigon and Haiphong found greater advantage in addressing themselves to Bristol houses. To prevent this in future a certificate of origin is required, and only goods made in France will benefit by the immunity granted to national products. Great rejoicings and a banquet took place to celebrate this protectionist victory.

The imports and exports during the 12 months were about 1,350,000 tons, or some 370,000 tons less than in the year 1888, when, however, I mentioned such a fall might be expected if there was anything like a fair harvest; in fact, importers then burnt their fingers, and had afterwards to export some of the wheat they had imported.

In the year 1888 Rouen was fifth in importance among the ports of France, the number of tons for the several ports being, Marseilles, 4,623,650 tons; Havre, 2,653,685 tons; Bordeaux, 2,489,512 tons; Dunkirk, 2,020,848 tons; Rouen, 1,721,710 tons; Cette, 980,151 tons; St. Nazaire, 915,930 tons; Dieppe, 597,703 tons; Boulogne, 476,116 tons; Bayonne, 465,788 tons; Nantes, 374,315 tons; Caen, 351,608 tons; La Rochelle, 335,883 tons; and Calais, 273,706 tons. The total is 22,468,120 tons, and I should say there will be a general falling-off from these figures in 1889, but whether to such a proportion as in Rouen we must wait some months for the returns to enlighten us.

A considerable amount of machinery is being imported for the mills, the manufacturers intention being evidently to be ready with the best and latest British improvements, before the new tariffs they are so anxious should, and which will, be imposed in two years' time.

Estuary.
River Seine.

An alteration took place during the year in the direction of the channel to the south of the bank called the Ratier, and the system of laying down the buoys to mark it was completely changed.

After the loss of the steamer "Border Chieftain" opposite to Honfleur, on March 28, 1889, it was decided to increase considerably the number of buoys, and to lay them down at shorter distances from one another. At present the channel in the estuary is marked by 35 to 40 buoys of various descriptions, but all of light construction, so as to be easily and rapidly shifted. These buoys are at distances from 800 yards to 1,000 yards longitudinally, and from 300 yards to 400 yards transversally, the buoys on one side of the channel being arranged in such a manner with respect to those on the other, as to place a ship always within 500 yards of a buoy. This system works well, but requires much care in following the variations of the channel with the buoys. To make this easier, the persons employed in the buoying have been transferred from Quillebeuf to Honfleur. Shortly after the accident

to be "Border Chieftain" the channel which had followed the the south bank of the estuary, and which after passing Honfleur took a northerly direction to pass into the central creek between Amfard and the Ratier, made its way to the south of the latter, and continued in this direction for the remainder of the year. As a result of this change, the channel has been more direct and deeper than it has been for many years, giving a depth in the shallower parts of, at high water neap tides, 19 feet 6 inches, and at high water spring tides 26 feet; thus it was not in this part of the channel that navigation was limited as to draught of water, but by the shallow parts of the bed of the river where the training walls exist, 16 feet 3 inches at neap tides, and 22 feet 9 inches at spring tides.

The lighted buoy which was laid down in the Amfard creek, as an experiment, has been put out. It will probably, however, shortly be lighted again and made movable, as are all the other buoys in the estuary.

Between this period and next spring the channel is again expected to change its direction towards the central creek after a time of transition, at which time it will require a great deal of attention from those who have the supervision of this service.

The repairing of the training walls was continued in accordance with the law of 1883. 48,000*l.* was expended on this between Caudebec and la Risle. Half the amount which was voted by the said law (376,000*l.*) has now been used. About 15½ miles have been repaired. A further sum of about 32,000*l.* will be expended during the year 1890. The deepening of the Bardonville passage was continued with a credit of 4,000*l.*, and a gain in depth of some 20 inches was obtained. The deepening of the passage of Moulineax and Grande Couronne near Rouen was also proceeded with at a cost of 5,800*l.* It is proposed to deepen the shallow parts here 39 inches, and half this increase of depth should be obtained in 1890. These parts, although not dangerous, cause vessels delay. It is also the intention of the engineers to dredge the shallow parts at Le Trait near Caudebec, after which there will only remain those at Flaques near Aizier, the dredging of which requiring considerable labour and expense will only be undertaken after a special vote by Parliament for the purpose.

The digging out of the petroleum and wood basins, and the filling up and arranging of the spaces surrounding them were continued at a cost of 28,000*l.* The petroleum basin is now in use, and has unfortunately been the scene, in the month of December, of a sad disaster, accompanied by the loss of one life.

The Chamber of Commerce is continuing to build the sheds for goods on the quays, and to put up the machinery for the hydraulic lifts.

The proposal to improve the channel of the Lower Seine, voted by the Chamber of Deputies, some details of which were given in last year's report, is again before the Senate, and the question when these improvements will be commenced is therefore in suspense. The proceedings of the Senate, during

the present session, with reference to this question have not been encouraging. The majority wish the works to be undertaken without the financial assistance of the Treasury, and this would, indeed, handicap the port of Rouen as well as that of Havre. In other French ports the improvements have to a great extent been financed by public money, and the proposed method would necessitate levying higher dues on ships in this than in other ports, and a corresponding loss of tonnage in consequence.

Slip labour.

The slip at Rouen (on which vessels are hauled broadside on) is 295 feet long, and can receive a vessel 312 feet long, weighing 1,800 tons. The slope of the inclined plane of the slip is 1 in 5; its breadth (in the direction of the hauling) is 168 feet 3 inches, and the cradles course is 119 feet 9 inches, which corresponds to a vertical rise of 23 feet 6 inches, which course can be traversed in 5, $3\frac{1}{2}$, or 2 hours, according to the speed at which the machinery is working.

When the cradle is at the bottom of its course, the checks are 14 feet 9 inches below high water in neap tides, but owing to the projection of the side cushions for shoring, this is reduced to 14 feet. When the cradle is at the summit of its course, the level of the checks is 39 inches above high water at ordinary spring tides, and 30 inches higher at equinoctial tides. The inclined plane is formed of 42 main beams resting on piles, to which they are mortised in a longitudinal direction; these main beams support steel rails on which the cradle runs.

The cradle is formed of 42 beams strongly framed together, which correspond with the main beams of the inclined plane; each beam also carries a steel rail; between the rails, which are beneath the cradle, and those on the inclined plane of the slip, are placed a series of rollers on which the cradle runs. The length of cradle is divided into two parts, which measure respectively 162 feet and 132 feet 8 inches, which can be raised, if desired, together for large vessels, or used separately for small vessels. On the land side the cradle has along its entire length a foot bridge, which is high enough to be always out of water. The hauling chains, 40 in number, are fastened to the cradle in the spaces between the beams; the chains are not fastened to the cradle itself, but work on movable pulleys over which runs a compensating cable, which equalises the strain on all the chains; this cable passes alternately on a movable pulley, and on another fixed to the cradle; its two ends are fastened to the cradle. Each hauling chain works over a windlass wheel, which is driven by an endless screw, the screw itself is driven by a bevel wheel on a shaft which runs from one end of the ship to the other.

The motive-power is a steam-engine of 50 h.p.

The British steamer "Fire Queen" and Swedish steamer "Cuba" were unable to make use of the slip a short time ago on account of the sand and mud, silting up with the flood tide, having rendered the gear unworkable. They had given three days notice, and after losing a day gave it up. It is the opinion of masters that this will be of frequent occurrence.

The cost of constructing this slip was 31,000*l*.

The new bridge across the river, opened in 1888, was built at Bridge. a cost of 160,000*l*., half being paid by the State and the other half by the city.

RETURN of all Shipping at the Maritime Port of Rouen in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.		Percentage of all Shipping.
	Number of Vessels.	Tons Registered.	Number of Vessels.	Tons Registered.	Number of Vessels.	Tons Registered.	
British ...	88	26,995	742	374,064	830	401,059	55·01
French ...	78	6,625	244	91,319	322	97,944	13·44
Swedish ...	6	3,060	102	77,775	108	80,835	11·09
Norwegian ...	23	11,171	125	49,559	148	60,730	8·33
German ...	5	2,043	64	34,981	69	37,024	5·08
Austrian ...	2	947	20	15,416	22	16,363	2·24
Spanish ...	...	...	24	15,168	24	15,168	2·08
Danish ...	4	1,267	10	7,923	14	9,195	1·26
Italian ...	4	1,942	2	1,657	6	3,599	0·49
Greek ...	2	461	4	2,562	6	3,013	0·41
Belgian ...	...	...	5	1,962	5	1,962	0·27
Russian ...	3	837	1	643	4	1,480	0·20
United States of America ...	1	442	...	...	1	442	0·06
Portuguese ...	1	286	...	...	1	286	0·04
Total ...	217	56,076	1,343	673,024	1,560	729,100	100·00
„ for 1888	331	114,342	1,534	808,168	1,865	922,500	...

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons Registered.	Number of Vessels.	Tons Registered.	Number of Vessels.	Tons Registered.
British ...	87	26,867	736	368,989	823	395,856
French ...	81	6,928	243	90,964	324	97,892
Swedish ...	6	29,12	102	77,553	108	80,465
Norwegian ...	23	11,430	124	49,322	147	60,752
German ...	5	2,043	63	34,214	68	36,257
Austrian ...	2	947	20	15,416	22	16,363
Spanish ...	...	...	23	14,439	23	14,439
Danish ...	3	1,068	10	7,923	13	8,996
Italian ...	4	1,942	2	1,657	6	3,599
Greek ...	2	461	3	1,846	5	2,307
Belgian ...	...	...	5	1,962	5	1,962
Russian ...	3	837	1	643	4	1,480
United States of America ...	1	442	...	...	1	442
Portuguese ...	1	286	...	...	1	286
Total ...	218	56,163	1,332	664,933	1,550	721,096
„ for 1888...	335	117,058	1,541	812,378	1,876	929,436

The river navigation, which is extensive, is not included in these tables.

The total decrease in tonnage between 1888 and 1889 of 193,400 registered tons is the greatest relapse which the general shipping in Rouen has yet received. It is naturally owing to there having been a good harvest in France in 1889, and a very bad one the year before; but, at the same time, with regard to British vessels, there, no doubt, is a certain loss on account of

the failure in the negotiations between the north of England shipowners and underwriters and the Rouen representatives. The British shipping, which was 60 per cent. of the total shipping last year, is this year only 55 per cent., and the decrease in registered tons is 152,267 tons. This decrease is chiefly in vessels carrying grain, steamers 93,383 registered tons, and sailing vessels 20,655 registered tons. Also in steamers from United Kingdom with general cargo of 18,198 registered tons; in sailing vessels with China clay; and in the indirect trade in wine, wood, minerals, salt, and general cargo. The cargoes of minerals, or of rice or molasses, arrived from United Kingdom. There has been increased registered tonnage in vessels laden with petroleum, chemicals, and beans. There is a small decrease in registered tonnage of colliers. A couple of small vessels brought apples from Devonshire, there having been a great scarcity of them here, a matter of serious moment in this cider drinking part of the world; and a steamer arrived with a deck load of cotton from New Orleans in the month of December. This may possibly be the beginning of a new import, as it, of course, comes indirectly in very large quantities.

There were altogether 254 vessels of 219,167 registered tons, against 413 of 346,252 registered tons in 1888, in the indirect trade.

In the outward cleared vessels there was an increase in the registered tonnage of steamers carrying sugar to United Kingdom, and general cargo and minerals to other ports, also in sailing vessels with sand, and a decrease in vessels with general cargo and plaster.

The decrease in the general shipping is made up of registered tons—British, 152,267; Italian, 16,005; German, 12,753; Danish, 11,187; French, 9,869; Russian, 5,040; Greek, 2,756; Austrian, 1,923; Portuguese, 1,827; United States of America, 1,725; Norwegian, 1,264; and Belgian, 840; and an increase of 16,529 in Swedish; and 8,673 in Spanish vessels.

Casualties.

The explosion and burning of the ss. "Ferguson" in the petroleum basin caused the loss of one life and the injury to four others, who are now, however, all recovered. The matter is the subject of an inquiry ordered by the Board of Trade, so any comment at present would be out of place. At the same time the question of discipline on board vessels is brought to the front by the vessels carrying petroleum in bulk, where for the safety of all concerned it is of the greatest importance that regulations should be strictly adhered to. Some of the methods introduced by the unions which seamen and firemen have established are hardly reckoned to improve matters, and, as an assistance to masters, I hope there may shortly be instituted a system of continuous discharges as exist not only in the Royal Navy, but in foreign merchant navies. It has often been proposed, and would have the support of all the masters; such a document would have another value than that of a union ticket, although the latter, or want of it, has occasionally serious consequences. I engaged a man on

board a steamer, and the following day the master informed me he had not joined, not having been allowed to do so by the rest of the crew, as he did not belong to their union. This is monstrous, and upsets all discipline. It is quite impossible to attempt to legislate in the same manner for vessels as for manufactories and other establishments on shore, the cases are so different, and as seamen in certain cases are specially protected, so should they be called upon to submit to regulations necessary for the safety and proper working of the ship. Unfortunately, they have not had the training foreigners so often have, under the conscription, in the service of the Government of their country, which, in most foreign vessels, makes the master's task so much easier. In those vessels, the men having been accustomed to strict discipline, and being punishable for offences by marine boards during the whole time they are liable to serve (which in this country is until 50 years of age), makes them hesitate before seriously committing themselves. German vessels are a good example of this system, and we could afford to follow them in that line with profit.

Unfortunately, as I surmised in my last report, the result of the negotiations between the shipowners and underwriters from the north of England and the deputation from the Rouen Chamber of Commerce, which resulted in a *pro formâ* agreement, was not ratified by their colleagues here. This was communicated by letters dated April 7 and May 15, and a meeting of the different associations was held in London on June 4. At this meeting they determined to boycott the port, in so far as they have since refused to protect shipowners in the event of claims at Rouen for boiler heating, unless the steamers were fitted in accordance with the Rouen requirements (however absurd these might be), and this, I am informed, has had the desired effect of checking owners from accepting Rouen charters, unless they were paid extra freight to meet these contingencies, and in many cases they have obtained 2*s.* per ton extra.

With regard to the river, they have imposed a special lighterage clause for all charters to Rouen.

The right of the shipowner, co-owner, or his clerk to enter the vessel in the custom house, and otherwise fulfil the duties usually undertaken by the sworn shipbrokers in France, has again been in question in Rouen during the year. It has met with strenuous opposition on every point, causing delay and a considerable amount of friction, and, until the interpretation of the law is laid down in a concise and undoubted manner, will continue to do so. The opinion of the Conseil d'Etat, to which body the case was referred, is decidedly favourable to the shipowners, as it includes, among those who are entitled to do the business of the ship, the consignee of the hull. These valuable opinions are, I think, very little known, and I, therefore, give a translation of them for the benefit of shipowners and others they may concern.

Failure of negotiations with the north of England shipowners and underwriters.

Brokerage questions.

COUNCIL OF STATE.

Extract from the Register of Deliberation of the Section Meeting of July 20, 1886.

The Department of public works, agriculture, commerce, and industry of the Council of State, having been requested by the Minister of Commerce and Industry to decide whether the consignee of the hull of a vessel can be permitted to make the necessary declarations and applications for the entry and clearance at the customs of such vessel, by himself, without the assistance of a broker, interpreter and ship conductor, principally as regards the deposit of the vessels manifest.

Whereas, according to a marine order, dated August, 1681 (Book 1st, Title VII.), and Article 80 of the Code of Commerce, the shipbrokers, interpreters, and ship conductors have the exclusive right to assist the masters and merchants or the shipmasters in the applications to be made before the customs, but, as Article 14 of the same order has expressly stipulated, that "the masters or merchants who wish to act for themselves shall not be obliged to employ any interpreters or brokers."

The result of these combined dispositions is that the privilege of the brokers, interpreters and ship conductors is not absolute, and that their intervention is not compulsory, except in case where the others concerned cannot, or will not, fulfil themselves the formalities prescribed by the rules and regulations.

As it has been decided that it is convenient to include among the interested, not only the shipowner, but also the sole consignee of the cargo (Ministerial Circular of October 25, 1817), that it is, in fact, to the personal interest of the latter to execute formalities which relate to his goods, and omission of which might result in the seizure of such goods.

As the same reasons may be urged on behalf of the consignee of the hull, it being as much to his interest as that of the consignee of the cargo, that the formalities, principally the deposit of the manifest, should be executed in the required time and conditions, since, were they not executed in the required time and conditions, he would be personally involved and compromised; and the hull, which is under his charge, might be seized as well as the goods composing the cargo; as under these conditions the consignee of the hull is not to be considered as one of those intermediaries offering no guarantee, and whom it has been the intention to keep away for the benefit of the commercial community as well as for that of the customs.

As the declarations made by the consignee of the hull should be received by the customs with no less confidence than those made by the captain, and particularly those made by the consignee of the cargo, for the first-named has not, like the two latter, any interest in the cargo which is submitted to the custom house duty.

Whereas the jurisprudence of the courts and tribunals seems inclined to adopt in the above-mentioned sense, and the Court of

Cassation, after having given, on December 27, 1873, a judgment opposed to the pretensions of the consignee of the hull, has admitted by the judgments of January 22, 1875, August 4, and February, 1879, that the "sole consignee either of a vessel or of her cargo have the same rights according to the interests which they represent;" that the Court of Donai has confirmed by a judgment on November 30, 1878, a judgment of the Tribunal of Dunkirk, which distinctly declares that "the single capacity of consignee of the hull is sufficient to authorise such consignee to fulfil by himself, or by his clerks, all the formalities required by the customs." Whereas, if it be the duty of the administration to enforce respect for the privileges which the law of July 18, 1866, has secured to the brokers, interpreters and ship conductors, it is also the duty of such administration to take care that such privileges are kept strictly within the limits defined by the law, and also that the exercise of such privileges offer no impediment to the development of maritime commerce.

The Department is of opinion:—

That it is lawful to permit the consignee of the hull of a vessel to make before the customs, without the assistance of a broker, the necessary declarations for the entry and clearance of that vessel, and particularly to deposit the manifest.

(Signed) H. CHAUCHAT, Reporter.
A. PICARD, President.
T. HÉBERT, Secretary.

Certified conform:

The Secretary of the Section,
(Signed) T. ZEBER.

Ministère du Commerce et de l'Industrie, Paris, August 28, 1886.

Sir and dear Colleague,

After several judgments given during recent years by the Court of Cassation, the question has again been raised as to whether the sole consignee of the hull of a vessel may be permitted, equally with the sole consignee of the cargo, to enter such vessel at the customs, or whether the right to do so is vested exclusively in the latter.

The department of commerce and industry had adopted the second conclusion, in accordance with a judgment delivered on December 27, 1873, and upon their application the Minister of Finance gave the custom house officers instructions on February 13, 1885, that the sole consignee of the hull should not thenceforth be permitted to make the necessary declarations for the conduct of vessels.

Since the Ministerial Circular has given rise to new demands on the part of the commercial community, I thought it advisable the department should apply to the Council of State for a definite settlement of the question.

The Section of Public Works, Agriculture, Commerce and Industry of the Council of State, have given it as their opinion

that it is permissible to allow the consignee of the hull to make, without the assistance of a broker, the necessary declarations before the customs for the entrance and clearance of a vessel, and particularly to deposit the manifest, considering that his title to do so rests upon the same ground as that of the consignee of the cargo.

I beg to hand you enclosed a copy of the said notice, which I adopt, and will ask you to give the custom house authorities such instructions as may be required to ensure execution thereof.

I remain, &c.

The Minister of Commerce and Industry.

(Signed) E. LOCKROY.

Direction Générale des Douanes, Paris, September 15, 1886.

The Administration declared by General Letter, No. 379, dated December 12, 1877, that according to a judgment of the Court of Cassation, given on August 14 of same year, any person having proved himself to be sole consignee of the hull of a vessel or her cargo, may be permitted to make all the necessary declarations before the customs and to take all necessary steps for the entry and clearance, and especially to deposit the manifest. But by a second General Letter, No. 776, it has been explained that an objection having been lodged by the Syndicate of Shipbrokers of Bordeaux, the commercial department, among whose attributions authority to deal with questions of ship-brokerage is especially prominent, had decided that the judgment of the Court of Cassation of August 14, 1887, concerned only the sole consignee of the cargo, to the exclusion of the consignee of the hull. The custom house officers were directed to accept the interpretation for their guidance in future.

The new jurisprudence having given rise to new demands on the part of the commercial community, the Department of Commerce and Industry have laid the question before the Council of State. At their meeting of July 20 last, the Section of Public Works, Agriculture, Commerce, and Industry, has decided that it was lawful to admit the consignee of the hull, on the same ground as the consignee of the cargo, to make, without the assistance of a broker, before the customs the necessary declarations for the entry and clearance of a vessel, and notably to deposit the manifest. The Department of Commerce and Industry having expressed this opinion, I beg that the Directors will issue to their subordinates such instructions as may be required to give effect to it.

I enclose in the present letter a copy of the extract of the Register of Deliberations of the Council of State, and also of the despatch from the Department of Commerce and Industry.

The State Councillor Director General.

(Signed) G. PALLAIN.

After this circular had been promulgated, interested parties brought pressure to bear on the Minister, and it was withdrawn, the matter again being referred to the Conseil d'Etat for reconsideration. Although over three years have elapsed the matter is still being reconsidered, and shipowners are deprived of the benefits which the highest opinion in the country in these matters consider they are entitled. I think every obstacle will always be placed to prevent owners and their agents doing the ship's business, and it is, therefore, of the greatest importance that they should have a good and clear case before attempting to have their vessels entered otherwise than with the assistance of a shipbroker, as, unless such is the case, they only suffer delay and expense, and prejudice the cause generally.

A final decision has just been given by the Court of Cassation, ^{Droits d'attache.} and a charge which has been made on vessels of 10 centimes per ton, since April 5, 1884, has been declared illegal. The matter was also submitted some time ago to the Conseil d'Etat, but that will hardly influence two decisions of the highest tribunal, the Court of Cassation; the Conseil d'Etat only giving an opinion, sometimes disregarded, even when no judgment is opposed to it, as in the case of the ship-brokerage. The city of Rouen will, therefore, have to reimburse between 25,000*l.* and 30,000*l.*, nearly half of which belongs to British shipowners. The latter should address themselves to their agents here to recover. The city finances, not too brilliant before, will suffer accordingly.

RETURN of the Principal Articles of Import to Rouen during
the Years 1888-89.

Articles.					1889.	1888.
Coal	..	..	..	Tons	169,086	324,788
Maize	..	..	..	..	151,712	113,482
Wood	..	..	..	..	74,104	72,513
Wheat	..	..	..	..	58,291	206,852
Oats	..	..	..	..	56,134	184,010
Petroleum	..	..	..	..	31,590	23,991
China clay	..	..	..	..	12,035	18,302
Stuffs and yarns	..	..	..	..	3,710	3,290
Seed	..	..	..	..	3,624	4,596
Oil	..	..	..	..	3,316	2,983
Raisins and currants	..	..	..	..	3,079	2,078
Lead	..	..	..	..	2,967	6,563
Rice	..	..	..	..	2,524	9,773
Tar	..	..	..	..	1,740	2,681
Machinery	..	..	..	..	1,565	1,417
Barley	..	..	..	..	..	17,195
Rye	..	..	..	..	..	8,800
Cast iron	..	..	..	..	1,427	1,054
Others	..	..	..	..	*	273,570
Total	..	..	..		*	1,283,938
Wine	..	..	..	Gallons	24,489,247	25,199,808

* Not procurable at present.

RETURN of the Principal Articles of Export from Rouen during
the Year 1888-89.

Articles.					1889.	1888.
Plaster stone	..	..	..	Tons	20,365	26,084
Glass sand	..	..	..	"	16,854	17,805
Sugar	..	..	..	"	12,827	11,302
Raw sugar	..	..	..	"	10,684	7,371
Chemicals	..	..	..	"	9,817	7,394
Coal	..	..	..	"	9,354	8,398
Rags	..	..	..	"	5,632	5,545
Millstones	..	..	..	"	2,962	2,280
Ochre	..	..	..	"	2,635	4,250
Barley seed	..	..	..	"	1,100	2,858
Seed	..	..	..	"	981	891
Others	..	..	..	"	*	82,187
Total	..	..	..		..	171,265
Wine	..	..	..	Gallons	119,137	125,762

Ton = 1,015 kilos ; gallons = $\frac{1,000}{2.20}$ litres.

* Not procurable at present.

Customs
receipts.

The customs receipts have been considerably less than in 1888. The amount then received was 31,497,091 fr. (1,259,884*l.*), and in 1889, 27,848,589 fr. (1,113,944*l.*), a decrease of 145,940*l.*

Quay dues.

The quay dues were, respectively, in 1888, 500,609 fr. (20,024*l.*), and, in 1889, 388,480 fr. (15,539*l.*), a decrease of 4,485*l.*

Octroi.

A falling-off of 279,586 fr. (11,184*l.*) in octroi receipts are accounted for by the Director, by the bad apple harvest, the decrease in the port traffic, and the exhibition attracting many inhabitants and visitors to Paris. The materials for building have also, in three years, diminished to such an extent as to diminish the octroi receipts from them 186,000 fr. (7,440*l.*). The sums received for octroi were, in 1888, 3,960,481 fr. (158,419*l.*), and, in 1889, 3,680,895 fr. (147,236*l.*).

INDUSTRIES.

Cotton
spinning.

Cotton spinning was in a favourable condition as to sales at the beginning of the year. The price, however, was less satisfactory, the raw material having increased without possibility of selling the manufactured goods at a rise of price in proportion. Later in the year, however, considerable orders were received for many months in advance, and as the price of the yarns was at their normal value, sales were effected at a satisfactory profit.

Weaving.

Was not profitable during the first quarter of the year, but improved after this period, particularly in the case of unbleached goods; the prices, however, were higher only in articles of Rouennerie. The orders from Algeria were not as considerable as usual. Later, a sensible reduction in the stocks caused a rise in the price of manufactured goods, and the Government measure

requiring certificates of origin of goods for Indo-China is said to have caused an immediate resumption of business in that quarter.

The bad harvest in the year 1888 caused great slackness in sales during the early months of the year, but an improvement was observable later, more especially in furniture stuffing, but in those at a low price. The weather was not favourable for prints for dressmaking. Printed
ginghams and
chintzes.

Hand weaving just exists, but is without future; but that by machinery has done fairly well. Pocket
handkerchiefs
and
Rouennerie.

Pocket handkerchiefs were not forthcoming in sufficient quantities, which gave the manufacturers a chance of raising their prices.

The great uncertainty as to the future of this industry causes a prejudice. On the one hand, the enemies call for a duty on maize, and on the other, the manufacturers call for the suppression of the "bouilleurs de cru" (growers who distil brandy from cider paying no excise). The sixth proposal during five years for a duty on maize is now before the French Parliament, and as I have already pointed out the success of such a proposal would be of serious injury to the Port of Rouen, and a large number of workmen and others, who are, some altogether and some partially, dependent on this industry. Distilleries.

Prices were maintained, but without much business being transacted. Want of confidence was the result of commercial and financial disasters early in the year. A tendency to fall in prices of chromate of potash and of soda, and a fall of 5 fr. in the price of starch. A rise of price in sulphate of soda, and (on account of the rise in the price of coal) in acids, and products in which they enter, of 10 per cent. took place at the end of the year. Chemicals.

During the first six months prices were low, and business depressed, but during the last half of the year, a great improvement was manifest. All leather rose considerably in price, with the exception of stout leather. Leather.

The year has not been a particular good one for the engine and boiler makers. Little or no new work being required for the district: they have had to look for orders elsewhere, in competition with the north of France, more favourably placed for producing work cheaply. This has also lead to specialities being taken up here, and Rouen is taking the lead in large gas engines, as she formerly did in steam engines. Engine and
boiler makers.

The annual elections seem to confirm former verdicts, namely, that they interest very little the members of the electoral college, who are entitled to vote in them. In Rouen, 412 votes were cast out of a total of 2,891 electors; at Cleres, 9 out of 249; Darnetal, 32 out of 387; Pavilly, 6 out of 279; and at Buchy, 22 out of 173. At some places the bureaux were not even formed. At the second ballot there were less voters than the first, and there being no opposition, the candidates, designated by the committee of selection, were duly elected. Elections for
Tribunal of
Commerce.

The number of births during the year in Rouen were 2,961, marriages 752, divorces 35, and deaths 3,417. The number of population. Statistics of
population.

deaths exceeded the births by 445, which, however, is less considerably than in 1888, when the difference was 851. One of the local papers gives as a reason for this excess in deaths over births the number of old people who come, not only from Rouen, but from the neighbourhood to the hospitals, and these figure very largely in the list of deaths. This, however, must be more or less the case in all large towns, and hardly satisfactorily accounts for this result. At the end of the year, when the influenza epidemic was raging, the deaths registered were from 30 to 40 a day, just double the average at that time in ordinary years.

CAEN.

Mr. Vice-Consul Leeson reports as follows:—

General observations on imports and exports in the year 1889.

It is satisfactory to be able to report that the revival of commerce at home during the year 1889 has had a beneficial effect upon the export and import trade of the port of Caen.

The import of coal has been carried on with unusual activity, many steam vessels carrying coal consigned to the port having discharged and cleared out within 24 hours, and in many cases even in less time than that.

Supply of coal—gradual rise in price.

The supply for the past year has been within a few hundred tons of that of last year, and there has been a gradual rise in the price, and in the beginning of the year 1890 a serious rise in its price took place.

Profits of the coal dealers.

The coal merchants at Caen derive a not inconsiderable profit, averaging from 7*s.* to 7*s.* 6*d.* in every ton of 1,000 kilos. sold, after deducting freight, octroi duty of 3 fr. 60 c., the Douane or custom-house duty of 1 fr. 20 c., and a small statistic duty of 10 cents. Freights for coal have maintained, with slight variations, the advances made in 1888, with a tendency to rise.

The timber trade.

The timber trade to this port shows a decrease from last year of between 7,000 tons and 8,000 tons.

Demand for timber decreased.

The timber yards are full, and there is not, just at the present time, much local demand for it.

Prices for timber.

Prices have varied from 150 fr. to 240 fr. per standard, or from 90 fr. per ton, depending upon the quality, the red woods commanding the higher prices.

Exports: iron ore from St. Rémy, large increase of export.

Turning to the exports during 1889, the foremost place must be awarded this year to the iron ore from St. Rémy, the exportation which has largely exceeded that of 1888 by upwards of 20,000 tons, a great portion has been shipped for Rotterdam and Germany, and the remainder for Glasgow and other English ports.

Barley, increase of export.

There has not been for many years such a demand for barley for export, and which exceeded that of 1888 by over 8,000 tons, and of excellent quality and in good condition, the grain was shipped for Rotterdam, Amsterdam, and the English ports.

Caen stone.

There has been a slight increase this year in the export of Caen stone.

Colza cake.

There has also been an increase in the export of colza cake. The cultivation of colza is gradually decreasing though it is well

known to be a good fertilizer in the preparation of the land for wheat crops.

A most material reason assigned for the low price of colza in the country is, that Germany, under the treaty of Frankfort in 1871, by Article II., as a favoured nation, while vigorously pushing her trade, has, among other articles, been pouring her colza oil into France, to the great detriment of that branch of the French industry, sending her oil down to a very low price in the market.

Decrease in the cultivation of colza.

Causes.

There may exist a *quid pro quo* in that other French manufactures are, in a like manner, and in observance of the same treaty, poured into Germany; but, in the meantime, the department of Calvados suffers with regard to the depreciation in market value of one of her principal articles of agricultural industry. The introduction of the heavier oils, and the use of gas, have also contributed to the fall in price of colza.

Notwithstanding the special laws adopted very recently against the fraudulent practices of the butter dealers and merchants here, in largely introducing various fatty compounds—to which fine names are given, as Oleomargarines of the period—to mix with the pure butter, this fraud has been, and is still being, carried on extensively in the department; and blind to their own interests, the exporters have, for some time past, been introducing the hitherto excellent Normandy butter to the English market, largely adulterated with the compound.

Continued adulteration of butter.

Export of butter to the English markets.

A syndicate of the butter merchants of northern France has been formed, and they have recently issued an appeal to all the honest butter merchants to endeavour to avert this disaster to the trade, through the increasing decrease of the exportation to foreign markets. This decrease in the demand being attributable to the adulteration of the hitherto pure butter exported.

Syndicate and proposed appeal to the butter merchants of northern France.

In proof of this evident decrease in the export of Normandy butter it would appear that in the year 1882 the export to the English markets alone amounted to the value of 89,900,000 fr., while in the year 1887 it had fallen to 58,100,000 fr., and since that year there has been a still further decrease.

Proof of the decrease of the exportation of butter to the English markets.

The syndicate before referred to proposes as a precautionary measure, and so to tie the hands of the persistent perpetrators of the fraud, that a new law shall be enforced to oblige the compositors of the compound to give it some colouring matter other than the hue of butter in its unadulterated natural state, so that it will then be impossible to mix it with the pure article without showing some trace of margarine.

Should this plan be carried out, no doubt some other plan will be adopted to defeat it by the less scrupulous dealers.

This adulteration of butter is extensively carried on in Caen.

The manufactures of Caen and the district remain in about the same state of activity from year to year without much addition of importance.

Manufactures.

There is a considerable increase in the manufacture of the Patent fuel.

patent fuel which yields large supplies for domestic purposes, the railways and the manufactures of the district.

There appears to be good foundation for the report that the coal district in the neighbourhood of Sittry, which has been worked more or less successfully until recently, has been abandoned, not from exhaustion of the coal, but through a want of enterprise on the part of the proprietors.

The manufacture of felt at Bayeux, at one time a profitable business, has also been abandoned, but in this case attributable to the introduction of silk plush from Lyons, which has almost entirely superseded it.

There are also slate quarries at Caumont, the slate being considered of good quality, these quarries are awaiting the formation of a railway for the conveyance of the produce beyond the arrondissement, and will probably have to wait for some considerable time.

The cotton industry in the district of Condé-sur-Noireau in this department flags, in comparing the consumption of raw cotton in the spinning mills there, there has been a steady diminution going on, averaging quite 45 per cent. since the year 1883, in that year the consumption between Condé-sur-Noireau and Pont-Eremberg in the same district having been 4,007 tons; in 1884, 3,578 tons; in 1885, 3,552 tons; in 1886, 3,604 tons; in 1887, 2,153 tons; and in the year 1888, 2,540 tons.

The administration of the "Ponts et Chaussées" have at length recommended that the telephone between Caen and Ouistréham, a distance of about 10 miles, should be opened for the public use, it having been retained heretofore exclusively for the use of that department, so greater facilities will be afforded for communicating with the seaport in matters relating to shipping and their movements.

A most desirable improvement has been effected in the towing service between the seaport and Caen by the addition of a new and powerful steam-tug, which was much needed to replace the diminutive impotent vessel in use for so many years.

Now sailing vessels can depend upon reaching Caen within a reasonable time after leaving Ouistréham.

The sum of 13,298 fr., of which sum one-half falls upon the department, has again been spent during the year 1889 in removing, by dredging, the sand bank that will obstinately collect in the same spot year after year at the entrance to the port of Ouistréham, almost closing the already too narrow passage between the piers, and being a very dangerous obstacle in the passage for shipping.

The work of removing this bank annually, and at a considerable expenditure, the authorities have at last begun to look upon as interminable a work as that of "Sisyphus;" accordingly the engineer in chief of the department has laid a proposal and estimate before the Minister of public works in March, 1889, for the carrying out of the long projected prolongation of the west pier in two sections of 60 yards and 102 yards each, forming a broad angle, and also the prolongation of the palisading on

Coal field at Sittry.

Felt manufacture at Bayeux.

Slate quarries at Caumont.

Cotton industry. Condé-sur-Noireau. Gradual diminution of supply of cotton.

Telephone improvements.

Tug service improvement.

Projected improvements of the port of Ouistréham by prolongation of pier, &c.

each side of the channel, to confine the current and sweep the sand downwards.

The total estimate for this much-required improvement is 141,000 fr., or about 5,600*l.*, in which is included 33,000 fr. for the removal of the bank formed within the last few months.

There has been some feeling existing of an injustice sustained by the merchants here at the hands of the railway companies, by the fact that the cost of transit of cast iron per 1,000 kilos. from Caen to Mans (a distance of 167 kiloms.) has been at the rate of 9 fr. 50 c., while the charge for the same by the same railway from St. Nazaire to Mans (a distance of 236 kiloms.) is a similar sum, viz., 7 fr. 50 c.

Charge for transit of cast iron by railway from Caen to Mans, and from St. Nazaire to Mans.

A protest was forwarded by those concerned to the Western Railway Company to take into consideration the fact of this being an injustice to Caen (which by the proceeding is being deprived of a portion of its trade, averaging for many years past 20,000 tons of iron), and the advisability of the readjustment of these rates of transit.

The fair of Guibray, which is a reasonable criterion for the prices and quality in the horse market in the department, has been more active than usual during the past year, and the purchase of horses for the remount of the French army exceeded that of the preceding year by between 200 and 300, and some unusually high prices were obtained for three-year-olds, viz., from 1,700 fr. to 1,800 fr., the lowest figures for the better class of horse having been 1,200 fr., or 48*l.* Horse dealers and breeders have had good reason to be satisfied with these remarkable prices.

Horse fair at Guibray, and purchases for the remount. Remarkable prices for three-year-olds.

The work of the remount increases in importance, and is under the direction of a general in the French army as permanent inspector-general and a general of cavalry as director.

The public health of the town and department has been very good, and up to the time of the breaking-out of the influenza epidemic at the end of the year, and which in a mild form filled the hospitals in Caen.

Public health

Unusual attention was paid to precautionary sanitary measures by the municipality in distributing disinfectants in the channels, in the streets, and the narrow confined alleys and courts of the town.

There has been no outbreak of disease or epidemic of any importance among cattle or horses in the district during the year.

Epidemic among cattle and horses.

There have been no improvements of any importance during the year 1889 in town or district.

The number of births in Caen during the year 1889 have been 902, marriages 264, divorces 17, and deaths 1,200.

Births, marriages, and deaths.

It is not by any means satisfactory to report year after year that in agricultural matters there are still complaints of existing hard times, general depression, and high taxation, with low and unremunerative prices for farm produce of all sorts, though, without doubt, the complaint of high taxation may have good foundation. With regard to the remaining causes of dissatisfaction, I have good and reliable reason to know they are exaggerated to a very great extent.

Agricultural complaints of depression.

Crisis in 1887. In the year 1887 there undoubtedly was a crisis in agricultural affairs, and a serious one: it passed away, however, but has left its effects behind it. I believe it is a fact that, through the numerous calls on the male population for the governmental services, and a not increasing population, the rural districts in the department are being gradually denuded of a considerable proportion of their agricultural labourers; with perhaps the exception of, in the neighbourhood of the large towns, where a great number of the residue migrate in search of employment, thereby causing a congestion of the already limited labour mart, and much destitution and misery is the result, and consequent mendicancy, and for which no regularly organised relief is adopted, governmental or otherwise, pauperism being much increased.

High taxation in the rural districts. With regard to the high state of taxation existing in the rural districts, there are authentic grounds for supposing that by the newly proposed appraisement of house property in the towns, and estimated to furnish the State with a surplus of 50,000,000 fr., the taxation of the farming and cultivable districts will in some degree be alleviated.

Rearrangement for taxation on house property in towns. For the past five years there may have been reasonable grounds for complaints of agricultural depression, but within the last few months they have commenced materially to diminish, as within that period there has been a considerable rise in the price of corn, and there is an improvement in the price of cattle also.

Alleviation of taxation in the rural districts. The prices of beasts for slaughter have averaged 70 c. per kilo. = 2 lbs. 3½ ozs. English.

Improvement in the price of cattle and corn. The price per sack of 2 hectolitres of corn in the year 1888 was 39 fr. 82 c., or 1*l.* 11*s.* 9½*d.*; for the same in the year 1889, 37 fr. 78 c., or 1*l.* 10*s.* 2¼*d.*

Wholesale price of beasts. The rate of taxation payable by the farmer in this department varies in proportion to the expenditure on the various public improvements carried out in the communes, and in accordance with the principal "les Contributions Directes;" moreover, the farmer and each inhabitant of the commune, from the curé to the smallest proprietor, is liable for three days' work on the public roads—himself, his horses, mules, asses, and vehicles of every description—in lieu of which work he is liable to pay an equivalent in money.

This law has been in force since 1836.

Number of hectares of corn in the department in 1889. The mean number of hectares in cultivation of cereals in the department during the year 1889 were—

							Hectares.*
Wheat..	..	..	..	..	..	..	105,000
Barley..	..	..	..	..	..	..	32,000
Rye ..	..	..	..	..	..	..	5,800
Oats ..	..	..	..	..	..	..	50,000
Meslin..	..	..	..	..	..	..	80

Harvest. The harvest generally throughout the department was abundant unusually early, and gathered in seasonable, dry weather.

Wheat crop. The wheat crop was a plentiful one, and full in the year, and straw good and long.

* A hectare is 2½ acres English.

Oats were also a plentiful crop and well ripened, and straw was good.

Barley was an unusually good crop.

Hay was very plentiful; thick and of very good quality.

The department was particularly favoured in the year 1889 in the apple crop, which exceeded that of the neighbouring department by a considerable quantity.

There has been a general rise in the price of cider, notwithstanding.

The number of hectares of corn in cultivation throughout the department of Calvados is computed to be slightly in excess of 1889. These crops are a month or six weeks in advance of the ordinary season, and damage to them may be the result, if severe weather sets in.

Bread has remained at about the same price, with very slight variations throughout the year.

Barley.
Hay.
Yield of apples in the department of Calvados.

Corn.
Crops laid down in the department; advanced state.

Annex A.—RETURN of all Shipping Entered at the Port of Caen in the Year 1889.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	45	4,429	253	84,658	298	89,087
French	99 Sailing and steam	...	...	...	99	38,377
German	10 " " "	...	...	...	10	3,455
Swedish and Norwegian	22 " " "	...	...	...	22	6,611
Russian and other flags	67 Sailing	...	...	...	67	30,143
Total	243	...	253	...	496	167,673
" for 1888	...	...	...	...	540	167,045

RETURN of British Vessels Entered at the Undermentioned Ports of the Vice-Consular District in the Year 1889.

	1888.		1889.		Nature of Cargo.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.		
Oniströham	6	908	5	587	Coals	...
Coursacelles	12	1,822	11	1,331	"	...
Port-en-Bessin	9	1,646	17	2,335	"	Timber
Isigny	2	345	5	536	"	...
Total	29	4,621	38	5,289	...	...

**Annex A.—RETURN of all Shipping Cleared at the Port of Caen
in the Year 1889.**

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	45	4,429	253	84,658	298	89,087
French	99 Sailing and steam	...	...	...	99	38,377
German	10 "	" "	...	...	10	3,465
Swedish and Norwegian	22	" "	...	...	22	6,611
Russian and other flags	67 Sailing	...	...	...	67	30,143
Total	243	...	253	...	496	167,673
" for 1888	...	...	...	...	540	167,045

**RETURN of British Vessels Cleared at the Undermentioned
Ports of the Vice-Consular District in the Year 1889.**

	1888.		1889.	
	Vessels.	Tons.	Vessels.	Tons.
Ouistréham	6	808	5	587
Courseulles	12	1,822	11	1,331
Port-en-Bessin	9	1,646	17	2,835*
Isigny	2	345	5	536
Total	29	4,621	38	5,289

**Annex B.—RETURN of the Principal Articles of Import to Caen
during the Years 1888–89.**

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Coal's	Tons ...	247,467	235,091 13	247,728	Not obtainable.
Timber	" ...	*29,343	154,045 0	37,957	

* Or 9,781 standards = 3 tons per standard—165 cubic feet per standard.

**RETURN of the Principal Articles of Export from Caen during the
Years 1888–89.**

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Iron ore	Tons ...	25,236	£ 9,084 s.	4,165	Not obtainable.
Barley	" ...	10,217	73,560 0	2,083	
Colza cake	" ...	1,518	12,147 0	1,043	
Caen stone	" ...	1,236	693 10	763	

HONFLEUR.

Mr. Vice-Consul Lethbridge reports as follows :—

There is little to notice in the state of trade during the past year. The improvement in the timber trade did not continue, and the depression remained the same in the coal and other businesses carried on in my district. General observations.

There have been two wrecks in the district, but, fortunately, neither attended with loss of life. One was a little ketch, loaded with coals, for Pont Audemer. She grounded in the River Risle, and, like the "Romeo" in the year before in the Seine, she was caught by a tidal wave and broken up in a few minutes. Casualties.

The other wreck was that of a large screw-steamer, the "Border Chieftain," bound from Huelva to Rouen, with about 1,800 tuns of wine. She struck a bank about a mile to the north of this port, and when the tide fell she broke in two. Both these vessels were in charge of the French pilot.

The number of sailing vessels entered at this port shows a falling-off of the large number of 126, and a decrease of 21,000 tons, principally timber and coals. Of these 126 sailing vessels, 46 were French coasters and 19 British, and the rest made up of Swedish and Russian. Shipping.

There was an increase of nine steamers, but the tonnage remained the same. As usual, the British flag covers two-thirds of the total tonnage.

The decrease in importation of wood and coals continued, about 4,000 tons less of each having been imported. The reason of this continued falling-off is, I believe, as I have pointed out in previous reports, the greater facilities offered to timber merchants at Rouen, and the advantages of Trouville for the carriage of coal to the interior. Imports.
Timber.
Coals.

The principal articles exported have remained at about the same level as the previous year. Exports.

The line of railway connecting Pont Audemer with Honfleur, of which mention has been made in these reports from time to time for the last 10 years, and which I reported as ready for traffic last year, was at length opened to the public last May. The official inauguration was performed by the Minister of Public Works. Communications.
Railway.

This line would be of great benefit to the trade of Honfleur, as it makes a reduction of about 30 miles between this town and Paris, if, unfortunately, there was not a short distance—viz., that between Pont Audemer and Glos Montfort—owned by a private company. When the Western of France Railway becomes the proprietor of this portion, as they intend doing, the improvement might result in a great increase in both imports and exports via Honfleur.

The health of this district has continued very good, no epidemics of any sort having occurred. Sanitary.

The population remains always about the same number, viz., 9,772. Births in 1889 decreased by 20, and deaths by 45. Population.

AGRICULTURE.

Grain.

Thanks to very favourable weather both for early and late sowings, and also during the harvest, the crops were generally good; that of wheat especially so, and barley and oats being of good average quantity and quality.

Roots.

Root crops were also well up to the average.

Hay.

It is many years since the quantity of hay saved has been so great as that of last year, and consequently fodder this winter has been exceptionally cheap.

Dairy
produce.

The low prices noted in my last report for butter and dairy produce generally has continued up to the end of the year, the mild weather having again allowed feeding in the open up to the new year.

Fruit.

The beginning of the blossoming season gave promise of a most prolific fruit season; but just as the buds were setting we were visited by strong east winds, which changed the whole aspect of affairs in 24 hours, the trees looking as if a fierce fire had passed over them.

Apples.

The apple crop suffered most, and there has scarcely ever been known such a small crop; consequently the price of cider this winter has gone up 50 per cent.

Other fruit.

Pears and all other fruit suffered considerably, and if it had not been that other districts exporting by Honfleur were more favoured, the quantity of fruit shown in the accompanying table would have been very much reduced.

Landed
proprietors.

Owners of farms continue to complain of the difficulty in finding tenants even at greatly reduced rents, and the tenants complain that they do not make enough to enable them to pay any rent at all. In short, the depression in agricultural matters is as great as ever.

Annex A.—RETURN of all Shipping at the Port of Honfleur
in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	20	3,133	104	53,389	489	123,680
„ Newhaven boat ...	...	...	182	36,591		
„ Southampton boat ...	...	...	163	30,567		
French... ..	5	1,290	...	...	5	1,290
„ coasters	182	14,603	361	20,757	563	25,360
Norwegian	35	13,467	...	...	35	13,467
Swedish	2	748	5	3,038	7	3,786
Russian	13	4,967	...	...	13	4,967
German	1	403	2	879	3	1,282
Other countries ...	5	1,877	3	2,701	8	4,578
Total	268	40,488	860	147,922	1,123	188,410
„ for the year preceding ...	...	...	...	...	1,240	208,633

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	21	2,520	103	53,440	124	56,960
" Newhaven boat	...	...	182	36,754	182	36,754
" Southampton boat ...	...	...	182	30,433	182	30,433
French	3	1,194	...	...	3	1,194
" coasters	177	14,232	379	20,693	556	34,925
Norwegian	32	11,191	...	...	32	11,191
Swedish	2	748	5	3,038	7	3,786
Russian	14	5,210	...	...	14	5,210
German	2	1,098	2	879	4	1,977
Other countries ...	7	2,369	3	2,701	10	5,070
Total	258	39,562	856	147,933	1,114	187,500
" for the year preceding ...	...	...	...	...	1,242	209,116

Annex B.—RETURN of Articles of Export from Honfleur during the Year 1889.

Articles.	Quantity.	
	1889.	1888.
	Tons.	Tons.
Eggs	4,824	4,722
Butter	5,783	5,100
Cheese	172	153
Grain	902	511
Poultry	1,318	1,250
Fruit	5,339	5,184
Sugar	1,954	3,681
Colza oil	146	22
Seeds	1,847	651
Other articles	7,015	4,087
Total	29,300	25,311

RETURN of Articles of Import to Honfleur during the Year 1889.

Articles.	Quantity.	
	1889.	1888.
	Tons.	Tons.
Timber	93,695	97,230
Coal	26,231	30,339
Iron	349	404
Oats	3,084	3,181
Cement	550	414
Seed	624	24
Other articles	2,107	2,814
Total	126,640	134,406

STATISTICS of Births, Deaths, and Marriages at Honfleur during
the Year 1889.

	Males.	Females.	Total.	Difference for 1889.	
				Increase.	Decrease.
Births	123	151	274	..	20
Deaths	117	111	228	..	45
Marriages.. ..	..	..	65	..	5
Population according to last census 1886	4,470	5,302	9,772	..	..

TROUVILLE-DEAUVILLE.

Mr. Vice-Consul O'Neill reports as follows :—

British trade imports. The coal trade from the United Kingdom to Trouville-Deauville has been brisk throughout the year 1889, and I note an increase of 10,963 tons on the year 1888.

Timber imports. The imports of timber are less.

Timber export. The only exports were 1,565 tons of pitwood, and 70 tons of wood for building purposes.

Freights. Freights have risen to about 1s. per ton.

Harvest of 1889—wheat. The wheat crop, though of not much importance in this district, was of a good, fair average quality.

Hay. The hay and straw crops are satisfactory.

Apple crop. The apple crop was inferior in quantity to the year 1888.

Cattle. No cattle disease to report. No cattle were exported, but 1,800 oxen were sent to Havre.

Trouville landing pier. There is at present in course of construction at Trouville-sur-Mer, by the Darlington Waggon and Engineering Company of England, a promenade pier, to be also utilised as a landing-stage, and which will enable packet-boats to arrive and depart at any hour of the day. The ironwork used for this purpose has been manufactured and imported from England, as well as the timber for the decking; also English artisans have been employed in the erection of it. The length of this pier is to be 1,195 feet, of which already 905 feet are completed, and it is expected that the pier will be in working order by next summer; and I have no doubt will be a great source of attraction and, at the same time, great utility to the town of Trouville. I may here mention that Mr. G. Palmer Harding, one of our well-known English residents here, is the real promoter of this undertaking.

Harbour works. The works of the half-tide dock are commenced, and are expected to be completed in the spring of 1891, enabling then vessels drawing 18 feet to enter safely.

Port. The channel is used daily by vessels drawing 14½ feet.

In Trouville-Deauville, in the year 1889, the following births, deaths, and marriages occurred:—

Births	268
Marriages	63
Deaths	232

Annex A.—RETURN of all Shipping at the Port of Trouville-Deauville in the Year 1889.

ENTERED.

Nationality.	Sailing.			Steam.			Total.	
	Number of Vessels.	Crew.	Tons Register.	Number of Vessels.	Crew.	Tons Register.	Number of Vessels.	Tons Register.
British ...	15	73	2,309	135	1,778	46,811	160	49,120
French ...	2	11	199	...	...	...	2	199
Norwegian ..	16	117	3,376	1	14	383	16	3,759
Russian ...	11	96	2,843	...	...	...	11	2,843
Danish ...	3	27	812	...	...	...	3	812
Total ...	46	324	9,539	136	1,792	47,194	182	56,733
„ for 1888	...	...	...	...	...	...	...	51,763

Eight British sailing vessels, total 740 register tons, and 36 men, entered the port of Dives during the year 1889.

CLEARED.

Nationality.	Sailing.			Steam.			Total.	
	Number of Vessels.	Crew.	Tons Register.	Number of Vessels.	Crew.	Tons Register.	Number of Vessels.	Tons Register.
British ...	15	73	2,309	135	1,778	46,811	160	49,120
French ...	2	8	130	...	...	...	2	130
Norwegian ...	16	117	3,376	1	14	383	16	3,759
Russian ...	11	96	2,843	...	...	...	11	2,843
Danish ...	3	27	812	...	...	...	3	812
Total ...	46	321	9,470	136	1,792	47,194	182	56,664
„ for 1888	...	...	...	...	...	...	...	52,265

Annex B.—RETURN of Principal Articles of Import to Trouville during the Year 1889.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coals	81,123	..	70,160	..
North sawn-wood ..	11,278	..	19,952	..
Cement	561	..	355	..
Iron	304	..	..	..
Pitch	1,215	..	454	..
Ice blocks	1,315	..	1,040	..
Oats	285	..	575	..
Cast iron	87	..	..	..
Total	96,168	..	92,536	..

RETURN of Principal Articles of Export from Trouville during the Year 1889.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Pit wood	1,563	..	550	..
Building wood	70	..	..	..
Total	1,633	..	550	..

FÉCAMP.

Mr. Vice-Consul Handisyde reports as follows:—

General observations.

There are no changes to report in respect to the harbour or to shipping. Cotton spinning and weaving have not given satisfactory results. The saw mills and tanneries did a good business in the first six months of the year, but it became very dull afterwards.

Agriculture.

With the exception of fruit the crops were generally very fair in this district, and many of the farmers, who were in rather straitened circumstances, have been able this year to pay some of their debts.

Newfound-land cod fishery.

46 vessels, of 11,500 tons register, with 1,143 men, took part last year in the Newfoundland cod fishery. The result for 4 vessels was very good, for 32 middling, and for 7 bad: 3 vessels have not yet returned. The fish caught in 1888 produced 146,582*l.*, and it will probably be about the same this year. The Bait Bill gave trouble at the commencement of the fishing, but salted herrings were later on found to answer very well as bait.

RETURN of all Shipping at the Port of Fécamp during 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	32	3,290	49	17,078	81	20,368
French	17	3,535	...	...	17	3,535
Norwegian	18	7,484	...	...	18	7,484
Swedish	2	636	2	722	4	1,358
Danish	10	1,550	...	...	10	1,550
Russian	2	1,108	...	...	2	1,108
German	3	677	2	936	5	1,613
Belgian	...	...	1	266	1	266
Dutch	2	255	1	1,223	3	1,478
Italian	1	288	...	...	1	288
Total	87	18,823	55	20,225	142	39,048

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	32	3,290	49	17,078	81	20,368
French	17	3,535	...	...	17	3,535
Norwegian	18	7,484	...	...	18	7,484
Swedish	2	636	2	722	4	1,358
Danish	10	1,550	...	...	10	1,550
Russian	2	1,108	...	...	2	1,108
German	3	677	2	936	5	1,613
Belgian	...	...	1	266	1	266
Dutch	2	255	1	1,223	3	1,478
Italian	1	298	...	...	1	298
Total	87	18,823	55	20,225	142	39,048

RETURN of Principal Articles of Export and Import during 1889.

EXPORT.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Oil-cakes	1,316	6,600	1,572	7,860
Flints	1,335	990	1,885	1,390
Plaster	230	300	480	380
Liquor	114	14,000	111	17,980
Bottles	35	350	95	900
Oil	72	2,400	62	1,900
Potatoes	139	445	..	..
Total	3,241	25,085	4,205	30,410

IMPORT.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coals	34,535	35,000	32,002	32,150
Coke	133	130	1,468	1,400
Cement	492	1,500	636	2,035
Wheat	1,043	11,520	593	5,990
Timber	16,497	59,500	14,576	51,638
Hemp	161	800	242	11,620
Tar	177	1,400	136	1,000
Salt	4,710	4,000	5,361	4,290
Rape seed	1,697	17,500	3,740	39,000
Ice	670	350	510	306
Arachides	1,569	1,400	..	..
Total	61,686	133,100	59,264	149,429

TABLE showing the Value of all Articles Exported from and Imported to Fécamp during the Years 1888-89.

Country.	Exports.		Imports.	
	1889.	1888.	1889.	1888.
England	4,135	4,115	36,630	37,115
Denmark	6,600	7,225	..	..
Germany	14,350	18,990	20,745	35,620
Sweden and Norway ..	..	..	32,245	30,179
Russia	..	80	2,590	3,253
America	..	..	26,415	19,512
Spain	..	..	2,030	1,600
Portugal	..	..	505	290
Roumania	..	..	2,170	15,000
Holland	..	..	2,329	4,460
Algeria	..	..	1,465	2,400
India	..	..	1,400	..
Argentine Republic ..	..	..	4,576	..
Total	25,085	30,410	133,100	149,420

FÉCAMP IN 1889.

Births	445
Deaths	290
Marriages	91
Divorces	3

DIEPPE.

Mr. Vice-Consul Lee Jortin reports as follows:—

General observations relating to improvements made in the port.

The year 1889 will be a memorable one in the annals of Dieppe, inasmuch as it has witnessed the completion of the works for the improvement of its harbour, which were commenced in 1881.

A commodious building in masonry has been erected on the Quai Henri IV., where passengers from England land, which comprises offices for the marine superintendent and clerks, a buffet and dressing rooms, custom-house for examination of baggage, and warehouses for goods in transit.

The fixed service of passenger steamers between Newhaven and Dieppe opened on the 1st of April, 1889, and has continued with great regularity during the whole period of the Paris Exhibition. Occasionally steamers are still unable to enter at low water; but this occurs very rarely, and only on certain dates, which are foreseen, and of which notice is given in the monthly time tables of the London, Brighton, and South Coast Railway Company.

In consequence of the diversion of the River Arques into the new channel, through the suburb of the Pollet, a certain amount of mud is carried down, which at times accumulates at the mouth of the harbour; but the Chamber of Commerce having purchased a dredger, which will be in constant use, this inconvenience will be obviated.

The number of passengers who have taken advantage of this route during the year has been altogether unprecedented. Its development has been such that it has far outstripped in numbers those who have taken the Boulogne route to Paris.

Passengers by the Dieppe route to the Paris Exhibition.

Passengers via Dieppe in 1889	..	..	183,179
„ Boulogne in 1889	..	..	110,023

On the two lines of railway connecting Dieppe with Paris—the one passing by Rouen, the other by Pontoise—the transit was accelerated during the continuance of the Exhibition. The line by Pontoise is 20 miles shorter than that by Rouen. Lines of railway now exist not only from the landing stage of the New-haven steamers, but all along the quays in direct communication with the station of the Western of France Railway Company; the total length of these exceeds five miles.

The new channel through the “Pollet” to the docks was made available for the first time on the 28th of November, when a barque called the “Ville de Dieppe,” 1,250 tons register, in the petroleum trade between New York and Dieppe, entered safely in a gale of wind, and was quickly moored in the new Retenue Dock. The large iron bridge across this channel, which is worked by hydraulic power, moves with the greatest facility and rapidity. Some additional quay works still remain to be completed at the angle of the new channel near the Pollet Church, and also on the opposite side, and a dry dock will be built by the end of 1890, as well as shipbuilding yards. The soil which has been dredged out of the new docks has been utilised to fill in some low-lying land in proximity to the Retenue Dock, forming a large extent of level ground, on which rails will be laid as soon as possible to connect the public warehouses on the quay of the new floating dock more readily with the line of the Western Railway. These warehouses are a branch of the bonded and warrant warehouses of Paris. They afford all necessary services to import trade, both for the receipt and forwarding of goods. These establishments receive and transmit all goods, such as sugar, grain of all kinds, flour, timber, coals, metals, coffee, cotton, paper pulp, &c. They undertake all customs and octroi business and formalities, and they provide for the negotiation of warrants and bills of lading.

Entrance to the new docks.

They are already connected by rails with the station of the Western of France Railway. Dieppe is also connected with the north of France by the line to Eu and Abbeville.

Since the setting back of the east pier (thereby straightening the entrance to the harbour and giving to the channel a minimum width of 82 yards), and since the space of the eastern breakwater has been increased, the noting of protests by masters as to their vessels not answering the helm when entering, which used to be frequent in former years, has almost entirely ceased. The Chamber of Commerce has under its control on the quays six weigh bridges for weighing cargoes. The charge for using them is 10 c. per ton, and the service of day and night watchmen,

Entrance to harbour safer than formerly

Weigh bridges. Watchmen.

for the protection of goods landed on the quays, also under the control of the Chamber of Commerce, proves a useful organisation.

There are three firms in the town for the supply, as ballast, of the blue flints from the shore (which are used in the manufacture of stoneware and earthenware), and for supplying the chalk from the cliffs for the same purpose, which can be used as limestone. These materials are abundantly found at Dieppe.

Certain industries in Dieppe and neighbourhood.
Tobacco manufactory.
Ivory carving.

In addition to the large (Government) tobacco manufactory, which employs 1,000 women, and the art of carving ivory, for which Dieppe is so justly celebrated, Saint Nicolas d'Alieumont, five miles from Dieppe, has a trade of great importance, namely, the manufacture of clocks. This place was known of old, and has a great reputation for the excellence of its clocks. Not only are clocks made there, but the skill of the workman has been used in other directions.

Electric incandescent lamps.

I allude to this more particularly, as an important new industry has been started and developed at Saint Nicolas by English enterprise and capital. It is the manufacture of electric incandescent lamps, in which business several English workmen are employed. The chief articles manufactured at Saint Nicolas are movements for aneroid barometers, English gongs for clocks, movements for carriage clocks and regulator clocks, and even for chronometers. Eightday and alarum clocks are an important part of the manufacture, as about 10,000 are turned out in a year. Mantelpiece and other kinds of clocks are made, but no watches. Escapements for these clocks come from the east of France.

Clock manufactory at St. Nicolas.

Workmen are also employed at Saint Aubin, Arques, and other places near, and in Dieppe itself, to manufacture certain parts for the manufactories at Saint Nicolas. In Dieppe alone 200,000 dials are turned out yearly for Saint Nicolas, Beaucourt, Paris, and even for England.

Dials for clocks.

Rate of wages earned by skilful workmen.

About 1,800 men, women, and children are employed, and on an average they earn over 2s. per day, and a good workman can make from 4s. to 8s. per day. The value of the manufacture is about 3,000,000 fr. per year.

This allusion to clockmaking in France may perhaps not be inopportune, as it appears that a former Secretary of State for Foreign Affairs—the Earl of Derby—is interesting himself in endeavouring to revive the languishing industry of watch and clock making at Prescott, near Liverpool, to compete with the machine-made clocks and watches of America and the Continent.

Chronometer for torpedo boats.

Another industry in Dieppe, if only on a small scale, is the manufacture of chronometers for torpedo boats, but it has been much encouraged by the French Government. Out of 15 prizes given at the last competition, not less than 6 were awarded to the manufacturers in Dieppe; and out of 10 which the Government bought, 5 were ordered from Dieppe. Each chronometer in gold case costs 20*l.*; in silver case 12*l.*

Manufacture of wood pulp for paper making.

At Bonne-Nouvelle, near the new docks, is a mill for the manufacture of wood pulp for paper making. The pulp is sold to paper mills in France, and mostly used, together with rags, for the

manufacture of various kinds of paper—from wrapping paper to superfine writing paper—but this pulp is so far different from others in the market, that not only can good printing paper, but also a high class of writing paper, and other superior kinds of paper be manufactured out of it without the addition of rags, and the samples of writing paper have very much the appearance of paper made of linen rags. The manufacture is a very simple one. The wood is the usual white wood from Sweden and Norway, or Finland, as no suitable wood can be supplied in large quantities from the neighbourhood. It is shipped in round timbers of from two to six feet in length, and three to twelve inches in diameter. The first operation is to remove the bark and clean the outside of the wood, which is done by women, and it has been found that women are more suitable for this work than men. Afterwards the round logs are cut into flat pieces of about $2\frac{1}{2}$ inches in thickness. The knots are now, as far as possible, bored out by machinery, but any remaining knots are cut out by hand. Great attention is paid to cleaning the wood in order to obtain a pulp clean enough for good kinds of paper. The cleaned wood is fed into a cutting machine, which rapidly chops it up into pieces of about half an inch in length. A band carries the cut wood to the top of the boiling-house. The boilers are of iron, covered on the inside with lead to protect the iron from the action of the sulphurous acids used. The boilers are filled with wood through an opening of the top, and then a liquid, containing bisulphate of magnesia, is poured in to cover the wood. The boiler is then closed with a cover, and boiling is now done with steam, the time varying from 10 to 12 hours.

When the boiling process is finished the steam is blown off, and the pulp forced out through a valve at the bottom of the boiler into a tank with a perforated bottom to allow all liquid to drain off. The incrustating and foreign substances in the wood having been dissolved by the boiling process, the mass is now a soft white pulp, consisting of fibres of wood. After being washed this pulp is ready for paper making, and for facility of transport is formed by machinery into rolls of a kind of rough, thick paper, which are forwarded to the paper mills, and contain about 50 per cent. of water.

The process used is known as Ekman's sulphite process, and is patented in France, England, and other countries. The chemicals—a solution of bisulphate of magnesia—are prepared by leading the gases from burning sulphur over magnesite, water being admitted at the same time. The magnesite (carbonate of magnesia) is a kind of stone which is found in large quantities in Greece, and imported from there. The sulphur comes from Sicily. The mill is at present worked on a small scale, turning out only about 100 tons of pulp per month, but being situated near the new docks it is advantageously placed for the import of wood, sulphur, and magnesite; and with cheap labour it is likely that it will be enlarged, and that this new industry will become of some importance to the trade of the town.

Manufactories
of patent fuel.

Patent fuel-making has been carried on here for many years. Messrs. Yeo, Thomas, and Co.'s factory was established about 30 years ago by the late Mr. Yeo, M.P. for Swansea, and his brother. Their establishment is capable of turning out 250 tons a day, but owing to the severe competition of French colliery proprietors, who are now manufacturing considerable quantities, and the ruling high prices of Welsh coal, only half this quantity is at present being made. The process is to mix small coal with a certain proportion of coal tar pitch. These ingredients are ground together, heated by steam, and then pressed into blocks of prismatic form, weighing about six pounds—a very convenient size for handling and for stowage in bunkers or tenders. The coal employed in their manufacture is exclusively Welsh. This fuel is extensively used on the French railways, and give most excellent results. It is also used by various industries of the district, and on a smaller scale for household purposes. There is another manufactory of patent fuel on a similar principle at Arques, four miles from Dieppe.

Agriculture.

Wheat, although a good deal laid by the heavy rains, has given a fair yield and of good quality in this district. The same may be said of rye, barley, and oats. Clover, sainfoin, and lucerne have produced a medium crop, whilst hay has been abundant and was well got in.

General
observations.

There has been a good harvest as regards beet and other roots, and but a poor crop of apples. In good years quantities of apples and potatoes are exported to England. Large crates of mistletoe are also sent over at Christmas. The sanitary condition of all animals has been generally good, and is so at the present time—very little sickness and no special disease of any kind.

No cattle
disease.

Births,
marriages, and
deaths.

There have been 807 births, 157 marriages, 4 divorces, and 698 deaths amongst the population of Dièppe.

Annex A.—RETURN of all Shipping at the Port of Dieppe during the Year 1889.

ENTERED

Nationality.	Sailing.		Steam.		Total.		Total Number of Crews.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British	18	5,038	306	131,009	324	136,047	4,685
Passenger steamers of L., B., and S. C. Ry. Co.	...	...	568	159,815	568	159,815	14,181
Steamers of French Co., Dieppe and Grimsby	...	...	169	54,955	169	54,955	2,977
French cargo steamers between Dieppe and Newhaven	...	...	362	69,197	362	69,197	5,463
French	51	7,724	11	3,740	62	11,464	439
Norwegian	44	16,002	15	6,161	59	22,163	657
Russian	21	7,118	1	602	22	7,720	214
Danish	8	1,243	13	12,217	21	13,460	310
Swedish	4	1,756	5	2,943	9	4,699	180
German	...	...	3	1,978	3	1,978	49
Austrian	1	548	...	...	1	548	12
Total	147	39,429	1,453	442,617	1,600	482,046	29,117
for the year preceding	220	51,800	1,421	475,981	1,641	527,281	27,447

N.B.—Of the above entries 32 British vessels, of 20,386 registered tons, brought cargoes in the indirect trade.

CLEARED.

Nationality.	Sailing.		Steam.		Total.		Total Number of Crews.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British	16	3,734	306	131,009	322	135,743	4,663
Passenger steamers of L., B., and S. C. Ry. Co.	...	...	567	159,515	567	159,515	14,161
Steamers of French Co., Dieppe and Grimsby	...	...	169	54,955	16	54,955	2,977
French cargo steamers between Dieppe and Newhaven	...	...	362	69,197	362	69,197	5,463
French	51	7,724	11	3,740	62	11,464	439
Norwegian	44	16,002	15	6,161	59	22,163	657
Russian	21	7,118	1	602	22	7,720	214
Danish	8	1,243	13	12,217	21	13,460	310
Swedish	4	1,756	5	2,943	9	4,699	180
German	...	...	3	1,978	3	1,978	49
Austrian	1	548	...	...	1	548	12
Total	145	38,125	1,452	442,317	1,597	481,442	29,075

**RETURN of British Vessels Entering the Undermentioned Ports
of the Vice-Consular District of Dieppe.**

	1889.		1888.	
	Vessels.	Tons.	Vessels.	Tons.
Port of Tréport.. ..	277	61,829	263	..
„ Eu	38	3,135	41	..
Total	315	64,964	304	..

**Annex B.—RETURN of Principal Articles of Import to Dieppe
during the Years 1888–89.**

Articles.	1889.	1888.
	Tons.	Tons.
Coals	299,496	335,496
Timber	93,443	124,104
Pig iron	6,309	9,374
General merchandise brought by the New- haven and Dieppe Steamboat Company	22,876	20,900
Total	422,124	489,874

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DISTRICT OF BOULOGNE.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 487.

*Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1890.*

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572. Buenos Ayres	3d.	633. Rome	1½d.
573. Frankfort	1½d.	634. Santiago	½d.
574. Canton	1½d.	635. Tahiti	½d.
575. Tamsui	5½d.	636. Maranhão	½d.
576. Palermo	3d.	637. Mexico	2d.
577. Amsterdam	1d.	638. Christiania	1d.
578. Ajaccio	½d.	639. Copenhagen	1d.
579. Shanghai	1½d.	640. Paris	1d.
580. Warsaw	½d.	641. Venice	1d.
581. Teneriffe	1d.	642. Cherbourg	½d.
582. Tangier	2d.	643. New York	1d.
583. Surinam	½d.	644. Patras	1d.
584. Loanda	1d.	645. Bourgas	½d.
585. Alexandria	1d.	646. St. Petersburg	3d.
586. Cagliari	1d.	647. Taganrog	½d.
587. Smyrna	½d.	648. Baltimore	1½d.
588. Mannheim	1d.	649. New Orleans	2d.
589. Nagasaki	1d.	650. New Orleans	1d.
590. Hakodate	1d.	651. Samos	½d.
591. Bushire	1d.	652. Buda-Pesth	1½d.
592. Chinkiang	½d.	653. Tripoli	½d.
593. Pakhoi	1d.	654. Buenos Ayres	½d.
594. Hiogo	1½d.	655. Paris	1d.
595. Bangkok	1d.	656. Cherbourg	1d.
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599. Chefoo	½d.	660. Buenos Ayres	½d.
600. Guatemala	1½d.	661. Galveston	1d.
601. Tonga	½d.	662. Galatz	1½d.
602. Tahiti	1d.	663. Antwerp	1d.
603. Stettin	2d.	664. Boston	1d.
604. Vera Cruz	1½d.	665. Madeira	½d.
605. Christiania	4d.	666. New Hebrides	½d.
606. Pernambuco	1½d.	667. Riga	1d.
607. Trieste	1½d.	668. Charleston	1d.
608. Tunis	½d.	669. Algiers	2d.
609. Havana	2d.	670. Stuttgart	1d.
610. Frankfort	½d.	671. Havre	3d.
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No. 674.

Reference to previous Report, Annual Series No. 487

FRANCE.

BOULOGNE.

Consul Bonham to the Marquis of Salisbury.

My Lord,

Boulogne, March 17, 1890.

I HAVE the honour to transmit to your Lordship, herewith enclosed, yearly Report on Agriculture for my Consular District, which includes the Departments of the Nord (except Dunkirk), the Pas de Calais, and the Somme.

I have, &c.

(Signed) E. W. BONHAM.

Report on Agriculture.

The past year was a most favourable one for farmers in this ^{Crops and} part. The crops of all kinds were good, the weather was very fine ^{season.} in June, and although much rain fell during the latter part of the summer the harm it caused to the grain crops was very slight, and was more than compensated for by the good it did to roots. The harvest ought certainly to be called a very good one, although the crop of oats was rather short. It was a good year all round for farmers; though proprietors still complain about their rents, any difficulties they may have do not arise from the bad crops.

It is stated in a recent official report that the extent of land sown last autumn with grain was equal to that of the previous year; it was sown under favourable conditions, and looks well.

Nord.—The usual complete statistics as to the Department of the Nord for 1888 are given in the *Annuaire*, which is published this year, and have enabled me to compile the following tables, viz., Annex 1, acreage under cereals and yield, but not value. Annex 2, acreage, yield, and value of other crops. Their value shows a slight increase over the previous year, though it is not equal to 1886, when it was given as nearly 4,000,000*l.* Annex 3 gives the number of animals on the farms; and Annex 4 the quantity and value of milk, wool, &c. I believe the figures for

last year, when published, will show a very large increase both in the quantity and value of all agricultural produce.

Pas de Calais.—The area of land sown with cereals in 1888 shows an appreciable increase over the previous year, when, though the area was slightly greater than the year before, the produce was less, but in 1888 the produce also was larger.

Nature of Crops.	Area in English Acres.		Produce in English Quarters.	
	1887.	1888.	1887.	1888.
Wheat	385,397	426,169	1,056,730	1,105,820
Wheat and rye ..	21,644	22,759	49,954	50,113
Rye	37,119	33,912	96,244	78,724
Barley	62,406	53,711	253,390	298,952
Oats	245,392	243,495	1,259,748	1,352,018
Total ..	751,958	780,046	2,716,066	2,885,662

With regard to other crops, the extent of land under cultivation and yield in 1888, as compared with the former year, was as follows :—

Potatoes	19,868 hectares, yielding	1,823,933 quintals
against	19,732	1,751,122
Beetroot	28,187	9,640,921
against	27,983	9,379,712
Oleaginous plants .	10,472	162,900 hectolitres of grain
against	10,616	170,407
Flax and hemp	3,457	{ 25,111 quintals of fibre
against	3,482	{ 26,599 " grain
		{ 25,018 " fibre
		{ 26,396 " grain

I hear that the yield of beet during the past year was very good, and that the roots were specially rich in saccharine matter.

Tobacco. There is nothing new to report as to tobacco; the extent of land authorised to be planted remains the same, and so do the prices payable by the State for the produce.

Prices. The market prices of corn and meat during the first fortnight of September, 1888-89, are given in the *Annuaire* of the *Pas de Calais* as follows, and I have added those for the previous year, as affording a better comparison :—

		Weights and Measures.	1887.	1888.	1889.
Beef	Per kilo.	..	1·87 fr.	1·70 fr.	1·72 fr.
"	" lb. ..	..	8½d.	7½d.	7½d.
Mutton	" kilo.	..	2·10 fr.	2·06 fr.	2·08 fr.
"	" lb. ..	..	9½d.	9d.	9d.
Veal	" kilo.	..	2·05 fr.	1·93 fr.	1·93 fr.
"	" lb. ..	..	8½d.	8½d.	8½d.
Wheat	" hectolitre	..	16·75 fr.	19·05 fr.	16·49 fr.
"	" quarter	..	38s. 10d.	44s. 2d.	38s. 2d.
Barley	" hectolitre	..	10·69 fr.	10·87 fr.	9·90 fr.
"	" quarter	..	24s. 10d.	25s. 3d.	23s.
Oats	" hectolitre	..	7·61 fr.	8·19 fr.	7·78 fr.
"	" quarter	..	17s. 8d.	19s.	18s.
Potatoes	" hectolitre	..	7·33 fr.	5·59 fr.	4·91 fr.
"	" bushel	..	2s. 1½d.	1s. 7½d.	1s. 5d.

The same Annuaire gives the following as the prices taken at the valuations (prises) at the markets of St. Remy and St. André:—

MARKET of St. Remy, October 1.

	1887.		1888.		1889.	
	Per Hectolitre.	Per Quarter.	Per Hectolitre.	Per Quarter.	Per Hectolitre.	Per Quarter.
	Fr. c.	About s. d.	Fr. c.	About s. d.	Fr. c.	About s. d.
Wheat (Blé froment) ...	17 04	39 6	19 72	45 9	17 42	40 5
" (Blé de fermage) ...	16 30	37 10	17 99	41 9	16 58	38 5
Rye ...	10 51	24 5	11 23	26 0	9 60	22 3
Oats ...	6 54	15 2	7 62	17 8	6 98	16 2
Winter barley ...	12 43	28 10	11 28	26 2	11 09	25 9
Wheat and rye mixed ...	15 24	35 4	16 27	37 9	15 40	35 9

MARKET of St. André, November 30.

	1887.		1888.		1889.	
	Per Hectolitre.	Per Quarter.	Per Hectolitre.	Per Quarter.	Per Hectolitre.	Per Quarter.
	Fr. c.	s. d.	Fr. c.	s. d.	Fr. c.	s. d.
Wheat (Blé froment) ...	17 13	39 9	19 99	46 5	16 98	39 4
" (Blé de fermage) ...	16 57	38 5	18 51	42 9	16 24	37 8
Rye ...	10 45	24 3	10 88	25 3	10 28	23 10
Winter barley ...	12 64	29 4	12 61	29 3	11 67	27 1
Oats ...	7 05	16 4	7 13	16 6	7 37	17 1

WEIGHTS and Measures.

One imperial quarter equals ..	2·90 hectolitres—French.	Weights and measures.
" hectare—French ..	2·4711 acres—British.	
" hectolitre ..	2·7512 bushel ..	
"	22·01 gallons ..	
" quintal ..	220·4 lbs. avoirdupois—British.	
" kilogramme ..	2·2046 ..	
(332)		A 3

DISEASES AMONGST CATTLE.

Cattle disease. It is difficult to obtain precise information on this subject, as the endeavour is to hush up the existence of any kind of disease rather than to proclaim it. However, in the yearly report of the chief veterinary surgeon of each department we obtain information which is no doubt reliable so far as it goes.

Pas de Calais.—In that for the twelvemonth to June 30 last, which has lately been published, the head of the department reports an improvement in the sanitary condition of animals, stating that the contagious diseases which had occurred during the twelvemonth in different parts had been pleuro-pneumonia, foot-and-mouth disease, swine fever (Rouget), and tubercular disease (la tuberculose).

Speaking of pleuro-pneumonia, he says it raged with some intensity in the commune of Tigny-Noyelles during the preceding year, without, however, spreading beyond the large farm on which it first appeared. The animals attacked had been destroyed, the places disinfected, and all the contaminated animals inoculated; when, six months after the apparent extinction of the disease, a heifer of a year old belonging to a small farmer fell ill without pleuro-pneumonia being thought of. The veterinary who was called, believing it to be a simple case of pleurisy, applied a large blister on the chest; and when he (the chief) was advised of the case he found the drying up of the skin (desquamation), following upon the action of the blister, had already occurred. The animal then appeared to be in perfect health; it eat well, did not cough, and it was found from auscultation and percussion that the respiratory organs were not affected. He, however, decided to continue to have it kept isolated, although the proprietor objected, and claimed to be allowed to send it to the communal pasture ground, which had just been opened. Fifteen days elapsed; its health continued perfect; all danger appeared over, and it was decided to allow the heifer in question to herd and graze with all the other animals of its kind, which it was destined soon to infect—he believes, at least, that the infection which occurred could not have had any other origin—although it continued in perfect health. Six weeks later, in fact, several cases of pleuro-pneumonia occurred almost simultaneously in the communal pasture grounds, thus proving that in treating and curing this malady, or that which may be this malady, a gross fault is committed from a sanitary point of view, and that the risk is run of creating new centres of contagion. Eighteen animals were destroyed, and it was necessary to inoculate at the season of great heat—that is to say, at the least favourable period for this operation—the 191 contaminated animals on the communal pasture ground, and of this number four perished from the effects of the inoculation, in spite of the almost daily care which the veterinary by his desire bestowed on them.

He goes on to state that the disease broke out with unusual violence in the commune of Douvrin—not that the malady was

more virulent than formerly, but because it was not recognised at first, and it had time to become a great focus of infection. He goes on to say that the crowded state of the sheds, their construction, &c., all tended to favour the development of the disease. On his first visit he found 10 animals attacked, some of them dying. All the animals on the farm were inoculated, but in the month which followed this operation, and before it could take effect, six more animals had to be destroyed.

He states that foot-and-mouth disease appeared on three or four occasions in different parts of the department, but that it was of a very mild description, and goes on to say it was in the district ("arrondissement") of Boulogne that it took most hold, adding; "but it is also there that the service of inspection of the fairs, markets, and slaughter-houses works the least well." Swine fever appears to have been very prevalent, and to have caused serious losses. I have also had occasion to report quite recently that I have obtained information of the existence of this disease.

Nord.—The veterinary surgeon reports the year 1888 as having been healthy, since out of the 260,000 cattle and 80,000 horses, more or less, which there are in the Department of the Nord, only about 600 of the former and 26 of the latter suffered from contagious diseases.

Pleuro-pneumonia was on the decline, only 75 animals in the district of Avesnes, and 126 in that of Cambrai, having been attacked by it, and these were the two districts which suffered most.

Foot-and-mouth disease only existed during the first half of the year, and then in a mild form: it was brought from the market of La Villette.

Fifteen animals succumbed to glanders and farcy; two in the Avesnes, seven in the Cambrai, five in the Lille district, and one at Valenciennes.

Twelve cases of rabies were reported—eleven dogs and one colt; but he says these figures are certainly very incomplete, as many cases are not duly reported.

Anthrax again occurred in the districts of Lille and Cambrai, four animals falling victims to it.

**Annex No. 1.—ACREAGE and Yield of Land under Grain in the
Department of the Nord in 1887-1888.**

Nature of Grain.	1887.			1888.		
	Number of Hectares Sown.	Total Yield.		Number of Hectares Sown.	Total Yield.	
		Grain.	Straw.		Grain.	Straw.
		In Hectolitres.	In French Quintals.		In Hectolitres.	In French Quintals.
Wheat ...	137,364	3,861,987	5,460,820	135,853	3,060,457	4,659,126
Wheat and rye mixed ...	1,912	50,725	75,766	1,757	44,709	69,558
Rye ...	10,733	237,067	359,802	10,610	217,281	346,148
Barley ...	11,946	510,963	376,849	11,717	406,960	330,506
Buckwheat ...	13	248	297	106	1,140	3,052
Oats ...	56,072	2,538,378	1,828,982	67,293	2,578,369	1,916,781
Indian corn ...	80	1,280	4,800	...	...	...
Millet ...	491	7,783	13,416	192	3,189	3,840

**Annex No. II.—RETURN showing Acreage, Yield, and Value of
Crops, other than Cereals, in the Department of the Nord
during the Years 1887 and 1888.**

Nature of Crops.	Number of Hectares Sown.		Total Yield in Quintals.		Total Value of Crops in £ Sterling.	
	1887.	1888.	1887.	1888.	1887.	1888.
Sugar beet ...	31,932	34,653	9,837,688	10,678,005	727,933	955,817
Other beet ...	6,507	6,706	2,029,208	2,981,907	141,908	201,665
Potatoes ...	23,698	24,620	1,887,890	1,274,993	491,107	458,489
Artificial pasture, clover, lucerne, sanfoin, &c. ...	32,683	31,829	1,711,846	1,550,536	451,750	416,345
Green crops ("fourrages annuels") ...	16,467	16,108	628,626	770,056	166,981	179,108
Temporary pasture (rye, grass, &c.) ...	505	516	22,344	35,157	5,101	5,464
"Prés Naturels," pastures ...	42,468	42,347	1,454,837	1,515,911	356,311	382,682
Grass (herbages) ...	20,896	21,585	955,365	1,266,435	217,703	318,030
Tobacco ...	631	592	12,109	16,183	37,065	47,698
Hops ...	873	854	10,523	11,632	32,339	38,586
Hemp ...	Tow ...	...	1,403	1,483	4,348	9,991
	...	164	...	...	...	...
Flax ...	Grain ...	...	834	765	548	454
	Tow ...	...	54,832	44,100	224,899	175,500
Colza ...	6,854	6,300	...	...	...	...
	Grain ...	...	41,124	34,650	42,407	35,135
Poppy ...	1,286	842	23,791	18,231	23,486	16,529
Camelina ...	969	968	10,882	12,210	15,940	19,214
...	339	467	3,177	5,611	2,696	4,793
Total ...	186,274	189,350	18,686,483	20,217,865	2,942,522	3,256,480

Annex No. III.—TABLE giving Details as to Animals on the Farms in the Department of the Nord.

	Number existing on December 31		Number lost by Disease, Accident, or Age in	
	1887.	1888.	1887.	1888.
Horses	81,785	82,807	2,097	2,063
Mules	2,010	1,961	50	58
Donkeys	2,888	2,823	64	64
Cattle—				
Bulls.. ..	5,910	5,615	130	120
Oxen.. ..	10,750	10,915	135	104
Cows.. ..	165,937	164,519	2,668	2,393
Young stock..	100,617	95,821	4,726	4,585
Sheep and lambs	101,475	103,025	2,961	2,619
Pigs	88,459	79,701	3,038	2,599
Goats	21,093	20,874	605	585

Annex No. IV.—OTHER Farm Produce in the Department of the Nord.

1887.

Nature of Produce.	Total Production.	Total Value in Sterling	Average Value.
		£	Francs.
Milk	4,096,658 hectolitres	2,888,080	17·62 per hectolitre
Wool	10,215 quintals	52,706	128·99 „ quintal
Bees (4,573 hives)—			
Honey	32,718 kilos.	2,314	1·76 per kilo.
Wax	9,537 „	958	2·51 „

1888.

Nature of Produce.	Total Production.	Total Value in Sterling.	Average Value.
		£	Francs.
Milk	4,124,157 hectolitres	2,810,507	17·03 per hectolitre
Wool	7,549 quintals	36,718	121·60 „ quintal
Bees (5,207 hives)—			
Honey	27,484 kilos.	1,989	1·80 per kilo.
Wax	10,792 „	1,117	2·58 „

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AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1889
ON THE
TRADE OF BORDEAUX.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 501.

Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1890.

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FRANCE.

BORDEAUX.

Consul Ward to the Marquis of Salisbury.

My Lord,

Bordeaux, March 20, 1890.

I HAVE the honour to transmit to your Lordship enclosed herewith my Annual Report on the Trade of Bordeaux for the year 1889, to which is annexed a Report on the Trade of Bayonne for the past year, furnished to me by Mr Vice-Consul Leeson.

I have, &c.

(Signed) WILLIAM WARD.

Report on the Trade and Commerce of Bordeaux for the Year 1889.

The general results of last year's business at this port in most branches of trade, and more especially in the wine trade, are not considered to have been much more satisfactory than those obtained in the previous year. The aggregate volume of the imports and exports during 1889 was about the same as for the preceding twelve months; for, though a falling-off took place in the former, more especially in the importations of foreign wines, coals, and colonial products, there was an augmentation of more or less importance in nearly all articles of exportation at this port compared with the year 1888.

Last year's vintage in this part of France, though not in general nearly as abundant as in the preceding year, was exceptionally plentiful in some districts. But the long run of unfavourable vintages during the past decade, as well as the uncertainty prevailing with regard to the quality of the wine produced during the last year, and likewise the want of demand from foreign countries for Bordeaux wines of a better class, prevent the wine export trade of this port from developing in a more satisfactory degree.

The share held by the United Kingdom in the seaborne trade of Bordeaux with all countries of the world, maintained its preponderance again last year over that taken by any other

General review of trade in 1889. Aggregate volume of exports and imports about the same as in 1888.

Vintage of 1889. Unsatisfactory condition of the wine trade.

Preponderance of seaborne trade with United

Kingdom
continues,

nation; and the tonnage of the British ships visiting this port during 1889 exceeded the figures for the previous twelve months by about 15,000 tons.

The several parts of the subjoined report are headed as follows, viz.:—

- I. Shipping and Navigation.
- II. Trade and Commerce.
- III. Population and Industry.
- IV. Public Works.
- V. General Remarks.

I. SHIPPING AND NAVIGATION.

Increase of
shipping in
1889.

The increase of 15,298 tons, which is apparant in the aggregate tonnage of the arrivals at Bordeaux-Pauillac during the past year compared with the figures for 1888, was chiefly due to the augmentation of tonnage under the British flag, though the arrivals under most other flags likewise show a slight increase. It will, however, be observed from the following tables, which comprise the arrivals and departures both at Pauillac and at Bordeaux, that, whilst the arrivals at its outport experienced an increase last year of 59,197 tons, those at Bordeaux itself show a diminution of 43,965 tons:—

Total ships
entered.

SHIPS of all Nations Entered in 1889.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British*	26	13,244	815	650,124	841	668,368
French†	313	66,139	413	380,037	726	446,176
Norwegian‡	44	19,679	52	25,275	96	44,954
Swedish	7	2,956	78	40,112	85	43,068
Dutch	4	1,191	53	18,934	57	20,125
German§	45	20,846	16	10,846	61	31,692
Austro-Hungarian	5	1,454	8	6,074	13	7,528
Italian	3	2,044	1	1,029	4	3,073
Danish	12	2,444	21	14,556	33	17,000
Belgian	...	...	26	6,500	26	6,500
Spanish|| ... ..	10	...	31	29,107	31	29,107
Russian	...	3,179	8	5,729	18	8,908
Portuguese	...	...	2	2,300	2	2,300
Greek	1	684	...	...	1	684
United States of America	3	3,463	1	1,838	4	5,301
Chilian¶	...	...	2	2,006	2	2,006
Total	473	142,323	1,527	1,195,467	2,000	1,337,790
„ for the year preceding	499	164,606	1,478	1,157,886	1,977	1,322,492

* Including 74 steamers and sailing vessels, of together 167,114 tons, entered at Pauillac, without ascending as far as Bordeaux.
† Including 102 steamers, of together 210,390 tons, entered at Pauillac, without ascending as far as Bordeaux.
‡ Including 2 sailing vessels, of together 1,866 tons, entered at Pauillac, without ascending as far as Bordeaux.
§ Including 1 sailing vessel, of 880 tons, entered at Pauillac, without ascending as far as Bordeaux.
|| Including 3 steamers, of together 5,354 tons, entered at Pauillac, without ascending as far as Bordeaux.
¶ Including 2 steamers, of together 3,006 tons, entered at Pauillac, without ascending as far as Bordeaux.

SHIPS of all Nations Cleared in 1889.

Total ships
cleared.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tonnage.	Number of Vessels.	Tonnage.	Number of Vessels.	Tonnage.
British* ...	25	17,386	808	641,896	833	659,282
French† ...	255	55,736	462	372,991	727	428,727
Norwegian‡ ...	47	22,717	53	25,859	100	48,576
Swedish ...	8	3,357	78	40,112	86	43,469
Dutch ...	4	1,191	53	18,934	57	20,125
German§ ...	44	19,647	16	10,936	60	30,583
Austro-Hungarian ...	5	1,454	7	5,436	12	6,890
Italian ...	3	2,044	1	1,029	4	3,073
Danish ...	13	2,666	22	15,105	35	17,771
Belgian ...	...	...	26	6,700	26	6,700
Spanish|| ...	...	...	31	29,107	31	29,107
Russian ...	11	3,463	8	5,729	19	9,197
Portuguese ...	...	...	2	2,300	2	2,300
Greek ...	1	684	...	...	1	684
United States of America ...	3	3,463	1	1,838	4	5,301
Chilian¶ ...	...	...	2	3,006	2	3,006
Total ...	419	133,813	1,570	1,180,978	1,989	1,314,791
„ in 1888 ...	415	156,142	1,560	1,165,296	1,975	1,321,438

* Including 74 steamers, of together 167,114 tons, cleared from Pauillac, without having been to Bordeaux.

† Including 102 steamers, of together 210,390 tons, cleared from Pauillac, without having been to Bordeaux.

‡ Including two sailing vessels, of together 1,866 tons, cleared from Pauillac, without having been to Bordeaux.

§ Including one sailing vessel, of together 880 tons, cleared from Pauillac, without having been to Bordeaux.

|| Including three steamers, of together 5,354 tons, cleared from Pauillac, without having been to Bordeaux.

¶ Including two steamers, of together 3,006 tons, cleared from Pauillac, without having been to Bordeaux.

The respective tonnage of the sea-going ships visiting the port of Bordeaux-Pauillac during each of the last two years which entered and cleared with cargoes, compared with those entering and clearing in ballast, was as follows :—

TONNAGE of Ships Entered in the Years 1888-89.

		1888.	1889.
		Tons.	Tons.
With cargoes	..	1,283,219	1,263,397
In ballast	..	39,273	74,393
Total	..	1,322,492	1,337,790

TONNAGE of Ships Cleared in the Years 1888-89.

		1888.	1889.
		Tons.	Tons.
With cargoes	..	1,059,186	1,063,919
In ballast	..	262,252	250,872
Total	..	1,321,438	1,314,791

Increase of
arrivals in
ballast.

The increase in the tonnage of vessels entering in ballast in the year 1889 was presumably due to a considerable falling-off in the importations of foreign-grown wines to Bordeaux during the past twelve months.

British
shipping.
Prepon-
derance of
British flag
continues.

It will have been observed from the preceding tables of shipping that the British flag continues to maintain its preponderating position amongst the various nationalities whose vessels visit this port, and that last year the aggregate tonnage of arrivals under the British flag was only about 1,100 tons less than the aggregate tonnage of the vessels of all other nations put together.

British
shipping at
Bordeaux.

The following figures, which refer only to the shipping entered and cleared at Bordeaux (but not also at Pauillac), will show the comparative number of arrivals and departures of British vessels at this port during the past six years. The figures for the year 1889, though as regards tonnage higher than in the preceding year, are, it will be seen, below the average of the previous five years:—

Year.	British Ships Entered at Bordeaux.		British Ships Cleared from Bordeaux.	
	Number.	Tonnage.	Number.	Tonnage.
1884	789	513,730	774	513,524
1885	757	478,714	752	453,834
1886	824	512,257	817	506,531
1887	840	534,558	834	536,207
1888	763	484,321	759	483,055
1889	741	501,254	759	492,168

British
shipping at
Pauillac.

The number of British ships entered (and cleared again after remaining there about 24 hours) at the outport of Pauillac during each of the last three years was as follows:—

	Number of Ships.	Total Tonnage.
1887	79	158,002
1888	75	156,010
188	74	167,114

The vessels touching at Pauillac were to the greater proportion steamers belonging to the Pacific Steam Navigation Company, which call there on their outward and homeward voyages to and from South America.

Direct sea-
borne trade of
Bordeaux.

With regard to the share taken respectively by the various countries of the world in the seaborne trade of this port last year, it may be observed that more than 30 per cent. of all sea-going ships visiting Bordeaux in 1889 either arrived from or were destined for ports in the United Kingdom. The respective share

30 per cent.
of seaborne
trade is

taken by other countries in the seaborne trade of Bordeaux was as follows, viz.:—

United Kingdom	30.9 per cent. of the seaborne trade	Share in sea-borne trade taken by other countries.
French colonies and fisheries ..	10.6	
Argentine Republic	10.5	
Spain	8.8	
Chile	7.2	
Portugal	6.1	
United States of America	5.5	
All other countries together	20.4	
Total	100.0	

The number of sea-going ships registered at Bordeaux at the beginning of last year was 155, and their aggregate tonnage 71,135 tons. Of this number 54 were steamers, of together 26,778 tons; 31 sailing vessels were built of iron and 70 of wood. Compared with the figures for the preceding year, it appears that the shipping registered at this port had experienced a diminution of 12 ships, of together 6,412 tons, all of which were sailing vessels.

Though it cannot be said that the French Government bounties offered to shipping built in France have been able to resuscitate the shipbuilding industry in this district, and though it would seem as if the total annual sum paid for these bounties, as well as more especially for the so-called "navigation bounties" to French sea-going vessels (viz., more than 10,000,000 fr. in the year 1888), must be a heavy burden for the finances of this country, there appears to be little doubt that the French shipping bounties system will be continued for a further period, after the expiration of the term for which the existing bounty laws were framed.

The present high rates of the pilotage dues at Bordeaux, and especially the obligation for vessels constantly frequenting this port to employ pilots, though the master may have proved himself fully competent to act without their assistance, continue to be much complained of both by French and by other shipowners. It appears that the question of revising the existing pilotage dues and rules for the river Gironde are under the consideration of the French Government, but that there is little hope of a reduction of the existing rates taking place, as the Government is both unwilling and unable to relinquish this source of revenue. The project of the Government, moreover, of substituting for the existing pilotage tariff—in which the dues are charged according to the draught of a vessel—a tariff based upon their tonnage, meets, it appears, with little approval here. For it is feared that if such a change should be made vessels visiting this port would be worse off even than at present, inasmuch as when only partly loaded they would have to pay higher pilotage dues than according to the existing tariff.

There is no change to be reported for the past year in the condition of the question as to French ship-brokerage charges at Bordeaux and at some other ports of this country. The question has now been so long before the public, that it would be useless

Improbability of any modifications being made in ship-brokerage charges.

for me to enter here into the grievances of our own and other shipowners against these charges at any length. I may perhaps merely observe that the French Government appears both unwilling from financial reasons, as also unable (if it were willing) owing to the strong protectionist tendencies prevailing in most parts of this country, and owing to the powerful influence of the ship-brokers, to make any move towards modifying the present state of things in favour of the shipowners, either from an administrative or legislative point of view.

Question of consignees of hull of vessel.

Recent decision of Bordeaux Court of Appeal.

With regard to the much-debated question concerning the right of the consignee of the hull of a vessel visiting this port to perform the custom-house formalities without the assistance of a resident shipbroker (the latter being in such case, according to the existing law, entitled to charge a fee amounting to no less than 5*d.* per ton of the entire cargo for a service occupying often only a few minutes), the same remains where it was a year ago. It is true that in an action recently brought by the Bordeaux ship-brokers against the consignee of the hull of a ship visiting this port, the Bordeaux Court of Appeal decided that the latter was *not* entitled to enter and clear the vessel without being accompanied by a resident shipbroker; but, on the other hand, judgments in a distinctly contrary sense have been given by other French tribunals, and more especially by the French Court of Cassation (on several occasions), as also by the Council of State at Paris.

Emigration from Bordeaux. Large increase of emigration in 1889.

The total number of emigrants embarking last year from Bordeaux for transatlantic countries was 28,905, an increase of no less than 10,186 persons compared with the number in 1888, and of 17,100 compared with the same in 1887. This increase of emigration during the last two years has been chiefly due to the large augmentation in the number of emigrants of French nationality: in 1889 the latter numbered 18,548 persons, or more than three times as many as in 1887. The other nationalities most numerous represented amongst the emigrants from this port are Spaniards and Italians. Of the former there were 7,459, and of the latter 1,233 last year. Of British subjects there were only 22, the same number as in 1888. South America, in particular the Argentine Republic, continues to attract by far the largest proportion amongst the emigrants from this port.

II. TRADE AND COMMERCE.

According to the statistics contained in the two following tables, which, in so far as regards last year are as yet incomplete inasmuch as the values are not yet ascertainable, it will be seen that, whilst there was an outfall last year in the aggregate of imports of 679,930 cwts. compared with the previous year, the aggregate volume of exports in 1889 show an augmentation of no less than 1,256,778 cwts. Whilst the augmentation in the latter appears to have been due to increased exportations of almost every article of trade of this port, excepting of rice, cereals, coffee, gum, dried vegetables, and certain chemical products, the diminu-

tion in the total imports last year was due chiefly to the large outfall in the importations of Spanish, Portuguese, and Italian wines, as also of coals, and of many colonial products.

Adding up the total volumes of the exports and imports for each of the last two years respectively, it will appear that the same amounted in 1889 to 20,676,203 cwts., and in 1888 to 20,099,355 cwts., thus giving an increase for last year of 576,848 cwts.

RETURN of Principal Articles of Export from Bordeaux
during the Years 1889-88.

Articles.	1889.		1888.	
	Quantity.*	Value.*	Quantity.	Value.
	Cwts.	£	Cwts.	£
Wine	1,398,193		1,301,203	5,838,932
Spirits and liqueurs ..	175,821		171,173	803,343
Fruit	236,044		210,000	602,855
Fish	187,391		167,217	608,317
Tissues of silk ..	266		142	89,092
" wool..	6,840		5,528	320,375
" cotton ..	65,377		35,224	707,516
" linen ..	5,631		..	..
Jewellery	498		140	1,496,834
Clothing, ready-made ..	2,114		3,599	256,834
Skins	4,302		8,173	797,516
Pottery and glass ..	227,836		211,388	199,438
Cereals and flour ..	31,013		46,188	49,232
Sugar	96,804		69,193	111,269
Chemical products ..	99,811		116,857	369,473
Paper, cardboard, &c. ..	39,910		32,748	106,822
Tools	53,581		48,490	212,305
Resin	98,263		68,615	65,241
Coffee	2,347		3,888	30,157
Wood, for building ..	3,074,149		2,280,280	234,825
Oils	76,473		66,107	216,100
Hides	48,058		44,977	363,308
Gum, colonial	6,735		6,928	113,056
Seeds	10,671		7,563	36,300
Rags	30,677		21,887	76,650
Wool	19,943		12,699	104,133
Perfumery	1,090		..	..
Rice	37,732		81,576	97,890
Meat, preserved ..	7,073		7,356	44,262
Iron and steel ..	48,373		39,248	16,564
Cork, manufactured ..	7,119		5,368	128,588
Vegetables, dried ..	33,234		100,792	53,756
Cheese	5,785		5,697	31,910
Tobacco, manufactured ..	1,815		2,349	52,902
Machinery	7,108		6,623	40,526
Miscellaneous	1,871,646		1,623,275	2,150,539
Total	8,019,257	..	6,762,479	16,466,360

* Calculated at the rate of 1 cwt. equal to 1 quintal of 50 kilos.; and 1l. equal to 25 fr.

FRANCE.

RETURN of Principal Articles of Import to Bordeaux in the
Years 1889-88.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Cwts.	£	Cwts.	£
Wood, for building ..	1,673,546		1,591,063	1,134,244
Skins and furs ..	260,905		193,145	1,331,056
Coffee ..	51,060		43,192	335,168
Wool ..	4,653		9,807	76,496
Sugar ..	247,804		254,472	376,964
Fish ..	306,990		294,285	862,776
Tobacco ..	46,556		35,407	177,032
Indigo ..	1,109		784	37,636
Cocoa ..	25,344		32,342	223,576
Grease and lard ..	57,614		64,685	224,936
Cereals and flour ..	1,554,608		1,534,140	1,152,948
Coals ..	3,808,683		4,283,211	257,164
Gum, colonial ..	26,325		23,377	331,312
Arachide-nuts ..	235,876		238,898	233,348
Spirits and liqueurs ..	131,906		146,465	260,532
Cheese ..	15,716		15,761	88,260
Firearms ..	337		..	..
Tissues of wool ..	2,517		2,374	85,668
„ cotton ..	23,095		20,278	430,504
Manures ..	115,921		75,354	45,348
Rice ..	90,000		207,534	209,412
Copper ..	18,436		49,791	368,452
Cotton, raw ..	6,907		..	..
Ships ..	47,330		83,590	117,024
Pepper ..	1,010		1,684	12,728
Oils ..	27,591		25,786	90,572
Iron and steel ..	65,707		116,775	36,552
Cloth, Indian ..	1,615		..	..
Wine ..	2,048,491		2,353,551	2,927,064
Chemical products ..	196,175		369,308	350,720
Meat, salted ..	6,414		29,147	153,168
Woods, exotic ..	29,665		..	..
Hemp ..	7,859		6,514	20,060
Vanilla ..	180		270	48,608
Miscellaneous ..	1,518,921		1,233,333	3,349,104
Total ..	12,656,946	..	13,336,876	15,433,432

With regard more particularly to the share taken last year by the United Kingdom in the export and import trade of this port, there are at present no statistics available for showing how far British trade participated last year in the augmentation of the former and in the diminution of the latter. So far as can, however, be judged by information derived from other sources, the volume of British trade with Bordeaux, both as regarded imports and exports, was greater last year than in the year 1888; and this augmentation was more especially due (1) as regarded the import trade from the United Kingdom, to increased importations of artificial manures, raw cotton, porcelain clay, tar, copper, molasses, chemical products, starch, glass, machinery, and preserved meats; and (2) as regarded the export trade from hence to British ports,

to more extensive shipments of pitwood, hides, wool, feathers, wine, sugar, cocoa, oils, resin, rags, linen and jute tissues, paper, sardines, and preserved meats. At the same time, however, a falling-off took place last year in the volume of the exportations from hence to the United Kingdom of certain other articles, viz., more especially of tartrates, preserved vegetables, fresh fruit, coffee, gum, crockery, woollen tissues, and wooden hoops; as also in the volume of the importations from British ports, more especially of rice, coffee, oils, jute, indigo, paper, and of linen and woollen yarns and tissues of various kinds. The comparative extent of last year's wine export trade from Bordeaux to the United Kingdom is noticed below.

Some observations on the course of last year's trade at this port in the prominent articles of business, and more especially as regards the wine trade, are here subjoined.

Wine.—The official statistics recently published with regard to the results of last year's vintage throughout France show that the aggregate production in 1889 amounted to 510,918,584 gallons, that is to say, 151,351,416 gallons less than in the previous year, and 24,413,664 gallons less than in the year 1887. The total yield last year was, in fact, less than in any year since 1856.

As regards more particularly the vintage results in the 15 south-western departments of France, which form this Consular district, it will be seen from the following table that, with the exception of three, viz., Charente, Landes, and Gers, there was a more or less considerable outfall in the production of every one of the departments in question compared with the year 1888. Comparing, however, the figures for last year with those for the year 1887, it will be found that the production in nine departments, viz., Gironde, Charente, Dordogne, Landes, Upper and Lower Pyrenees, Lot and Garonne, and Tarn and Garonne, still show a considerable excess for 1889.

Wine: vintage of 1889 throughout France.

Vintage of 1889 in Bordeaux Consular district.

Outfall in production in 1889 in 12 departments. Excess compared with 1887.

Departments of Consular District.	Annual Yield of Wine.		
	1887.	1888.	1889.
	Gallons.	Gallons.	Gallons.
Gironde.. ..	25,066,074	66,000,000	47,267,352
Charente	1,556,918	2,605,433	2,295,216
Dordogne	2,093,053	2,310,000	2,237,730
Gers	14,061,190	20,517,310	20,753,964
Lot and Garonne	5,865,156	5,835,940	4,949,956
Landes	2,176,504	6,093,076	6,188,358
Lower Pyrenees	2,221,450	3,094,746	2,964,346
Upper	1,447,270	1,896,598	1,468,698
Ariège	953,744	2,191,464	924,880
Corrèze	769,890	757,548	502,634
Upper Garonne	10,135,202	16,836,292	8,609,238
Lot and Garonne	1,756,854	5,835,940	4,949,956
Tarn and Garonne	4,437,090	5,600,958	4,782,162
Vienne	9,480,482	5,441,876	3,433,232
Upper Vienne	113,190	23,144	8,470

Production in
1889 in
Gironde de-
partment.

Outfall com-
pared with
1888.

Increase com-
pared with
1887 and
previous 10
years.

Growth of
vines in 1889
at first
menaced by
mildew.

Subsequent
months very
dry.

Final ripening
much
benefited
by rain.

Quantity of
yield
unexpectedly
abundant,
especially in
Médoc.

It will be seen from the preceding figures that amongst the 12 departments of this district which respectively show a falling-off last year in their production, the Gironde, the most important of all the wine-growing departments, not only of this but of all parts of France, is likewise comprised. The total yield last year in the Gironde was 18,732,647 gallons less than in 1888; but it may be observed that the year last mentioned was one of exceptional abundance, in fact one of the eight most abundant years of the last half century. A comparison of last year's yield with that of 1887 will show an increase in favour of 1889 of no less than 22,201,276 gallons; and a comparison with the average annual yield of the 10 years (1877 to 1886) would give an excess of 10,122,420 gallons in favour of last year. Taking the department of the Gironde as a whole, there would accordingly not seem to be much reason for the producers or for the Bordeaux wine merchants to feel dissatisfied with the results of last year's vintage, in so far, at least, as quantity was concerned. The question of quantity is, however, as need hardly be observed, not the most important one for the trade, especially where wines of a superior class, such as are mostly produced in the Gironde, are concerned.

The growth of the vines in this district during last year was at its commencement seriously menaced, and, in many instances, prejudicially affected by mildew and oidium in consequence of the unusually wet weather in April. Preventative measures against these two cryptogamic diseases were, it is true, extensively applied by many vineyard proprietors in due time; but there were also numerous other proprietors who, being taken by surprise by the unprecedentedly early and heavy fall of rain, were too late in taking these measures, and their vineyards suffered accordingly from mildew in a serious degree. The subsequent months again were so persistently dry that, towards the beginning of September, the grapes nearly everywhere had assumed a parched and small appearance, and fears were generally entertained that the crop would be but very scanty. Fortunately, however, during the latter part of September and the first part of October—that is to say, during the final stage of ripening—beneficial rainfalls took place, and, thanks to these it was found, when the vintage actually commenced, that not only had the berries largely increased in size, but that the quantity of grapes was much greater than had been expected. The quantity of wine made in some parts of this district, for instance, in Médoc, was accordingly in excess of what had been anticipated; and in some vineyards, amongst which were many of the so-called “classed” growths, the quantity was indeed greater than in any previous year on record. A comparative table of the results of the vintage of the “classed” growths of Médoc during each of the last three years may be of interest, and is here subjoined:—

Classed Wines of Médoc.	Yield in the Year.			Classed growths of Médoc.
	1887.	1888.	1889.	
1st class growths—	Hogsheads.	Hogsheads.	Hogsheads.	
Lafite	480	976	916	
Margaux	496	1,248	1,304	
Latour	280	640	548	
2nd class growths—				
Mouton	298	444	864	
Rauzan Ségla	156	340	336	
„ Gassies	52	136	200	
Leoville Lascazes	320	700	976	
„ Poyfère	152	408	560	
„ Barton	200	424	500	
Durfort	84	200	236	
Gr. Larose	260	920	1,104	
Brane Cantenac	180	540	664	
Pichon Longueville	128	648	800	
Durrou	352	320	480	
Cos d'Estournel	404	740	960	
Montrose	440	900	900	
3rd class growths—				
Kirwan	152	408	392	
Issan	292	632	628	
Lagrange	668	1,160	1,152	
Lango	300	640	740	
Giscours	84	400	548	
Palmer	240	708	908	
Lalagune	20	132	320	
Desmirail	64	164	296	
Calon	444	604	692	
4th class growths—				
St. Pierre Rollet	40	56	80	
„ Bontemps	120	200	312	
Marquis d'Aux	208	408	520	
Duluc	216	440	408	
Duhart-Milon	328	600	792	
Luetkens Carnet	160	320	174	
Lafon Rochet	108	200	220	
Beycheville	268	628	880	
Le Prieuré	44	140	160	
Marquis de Thermes	144	372	344	
5th class growths—				
Pontet Canet	600	1,380	1,360	
Batailley	280	472	476	
Gd. Puy Lacoste	400	780	900	
Ducas	280	440	660	
Lynch Bages	320	660	740	
Lynch Moussas	204	404	380	
Dauzac	112	600	640	
Armailhac	652	1,400	1,280	
Bruno-Devès	72	188	256	

The favourable results obtained last year in Médoc, as shown by the preceding figures, and also in some few other parts of the Gironde were not however, as already stated, experienced in all wine-growing districts of this department; and in most there was a considerable outfall in the quantity harvested compared with the year 1888.

Results of
vintage in
other parts of
the Gironde.

Phylloxera in
the Gironde
vineyards.

The destruction caused by the *Phylloxera* continues to be, besides the unfavourable weather, the prominent reason for the outfall in the wine production both in the Gironde—where there are still more than 150,000 acres of vineyards more or less infested by this noxious worm—and in most other parts of France. But, as already observed in my last annual report, it is nevertheless the opinion of most experienced viticulturists that the *Phylloxera* may be said to have done its worst, and that upon the whole the French vineyards are gradually recovering from its widespread ravages, which began more than 10 years ago. Not alone are now the most efficacious remedies for combating the *Phylloxera* becoming more and more appreciated and brought into use, but the area of fresh plantations of American vines producing direct, or of American plants grafted with French vines, is annually increasing in a most satisfactory manner. It may, moreover, be observed that there have been, even during the last decade, and, notwithstanding the existence of the *Phylloxera*, years (like 1888) in which the quantity of wine produced in the Gironde, and also in some other departments, has been far greater than in many previous years when this noxious worm was as yet quite unknown.

Vineyards in
the Gironde
gradually
recovering
from
destruction.

Cochylis in
the Gironde
vineyards.

Another worm which is stated to have made its appearance in a more marked manner of late amongst the vineyards of this country is the “*cochylis*,” or so-called vine worm, a tiny animal which, after lying imbedded in the bark of the vine, attacks the plants more especially during the flowering season. Some persons are of opinion that the destruction caused last year by the “*cochylis*” alone amongst the vines in the Gironde, was so great that the loss thereby may be estimated at more than 40,000,000 gallons of wine.

Mildew in the
Gironde
vineyards.

Effects of
mildew on
quality of
wine.

The greatest enemy of the vineyard proprietors (and likewise of the wine merchants) of this district, next to the *Phylloxera*, appears at present to be mildew, and also, though in a minor degree, oidium. Mildew has not, it is true, affected the quantity of the crop in such a marked manner as some other causes; but it doubtless has had, and still has, a disastrous effect upon the quality of the wine produced from plants which have been infested by it. It is considered by competent authorities that a large percentage (some believe as much as 50 per cent.) of most Bordeaux wines produced during the period from 1882 to 1886 in most parts of the Gironde department are more or less seriously affected by mildew which prevailed during their growth. Though it is not possible for me to say how far this estimate may be correct, it will, I believe, at all events be admitted by most persons who have had opportunities of tasting bottled wines of the vintages referred to, that a considerable percentage of the same possess an unpleasant musty flavour, which is doubtless caused by mildew. As regards the wines of the last three years, these, it is thought, will be found (when bottled) to have suffered much less from mildew than those of the five preceding vintages. For not only have the former been produced under

Wines of last
three years
have suffered
less from
mildew.

more favourable atmospheric conditions, but it is certain that during the last three years the best known preventative remedies against the spreading of mildew among the vines in this district (in particular the so-called "Bouillie Bordelaise") have been brought into use much more extensively and in a more effective manner than formerly.

I may here observe that the greater prevalence of mildew during the last decade amongst the vineyards of the Gironde is ascribed by many persons not only to unfavourable weather, but in some districts to the submersion of the vineyards under water—a measure which, as is well known, has to be annually resorted to wherever practicable in order to destroy the *Phylloxera*. Causes of mildew.

With regard to the quality of the 1889 vintage in this department, it is doubtless at the present date too soon to pronounce a decided opinion as to how it may eventually turn out. But the majority of views at Bordeaux seem to be favourable as to the eventual success of the 1889 wines of the Gironde, taking them as a whole. They have, in general, more colour, more body, and more fruitiness than the 1888 wines, and some kinds are said to have considerable finesse. Though, it is true, there has been a comparative standstill in business since the beginning of the present year, and the Bordeaux merchants appear to be now waiting for producers to lower their prices, those paid hitherto (and especially immediately after the close of last year's vintage) for 1889 wines of this district have been a proof of the generally favourable opinions held here regarding the same, as they have been much higher than the quotations for 1888 wines of the same class. Quality of 1889 wine.
Higher prices paid for 1889 wines.

The 1888 wines are, as already observed in my annual report of last year, fairly good light wines, which, as they will speedily reach maturity and are low in price, may be considered a good investment for those persons who want a light, drinkable wine for immediate consumption. The wines made in 1887, though, as is well known, of a superior quality in many respects, will not be drinkable for many years to come, owing to their great amount of body. Taking the last three years together, the Bordeaux wine merchants may, it is thought, upon the whole feel fairly satisfied with the prospects of their trade, especially after the five very unfavourable years which preceded the year 1887. Wines of 1888.
Wines of 1887.

The following table will show that there was a slight increase last year, compared with the preceding twelve months, in the shipments of wine in wood and in bottles from this port to foreign countries. As regards the former this increase amounted to 1,344,838 gallons, and as regards bottled wines it was 155,122 gallons, viz.:— Wine-export trade in 1889.
Increase of exportations in 1889.

Countries to which shipments were made in 1888 and 1889.

Countries whither Exported.	Wines in Wood.		Wines in Bottles.	
	1888.	1889.	1888.	1889.
	Gallons.	Gallons.	Gallons.	Gallons.
United Kingdom	3,179,132	3,448,192	687,868	693,880
Germany	4,053,984	4,167,284	65,274	48,147
Russia	48,708	109,736	3,718	10,978
Belgium	1,436,534	1,436,666	32,186	38,984
Netherlands	1,552,112	1,549,988	36,058	45,276
Sweden and Norway ..	122,078	318,648	41,998	52,502
Denmark	311,124	340,098	6,116	7,722
Spain	20,712	20,174	11,880	9,482
Egypt	37,884	33,198	5,818	3,696
British India	18,898	20,174	10,472	11,902
U.S. of America	340,516	340,560	182,908	155,738
Mexico	125,136	223,673	43,914	74,668
Brazil	235,510	223,393	40,238	32,252
Uruguay	1,585,122	1,587,190	16,984	21,818
Argentine Republic ..	7,218,860	8,270,724	156,364	214,016
Other countries	2,608,826	2,156,276	349,740	326,977
Total	22,895,136	24,239,974	1,592,536	1,747,658

Comparative extent of wine shipments during the last 10 years.

On comparing the figures showing the aggregate shipments from Bordeaux to all foreign countries of wine (in wood and in bottles) during each of the last 10 years, as given below, it will be seen that (excepting in two years) there have only been slight fluctuations in the annual exportations from Bordeaux, which, it may be added, represent about one-half of the total exportations of wine from all parts of France, viz. :—

Year.	Total Exportations.
	In Gallons.
1880	25,085,214
1881	25,642,650
1882	26,093,826
1883	24,215,222
1884	26,990,184
1885	25,375,584
1886	29,667,088
1887	28,652,404
1888	24,487,672
1889	25,987,632

Complaints as to unsatisfactory state of Bordeaux wine export trade.

Character of wine export trade has changed.

A glance at these figures would lead one to imagine that the frequent complaints heard of late years regarding the falling-off of the Bordeaux wine export trade, and of its growing unprofitableness for exporters, must be unfounded, or at least exaggerated. But it is necessary to bear in mind (as already observed on previous occasions in my reports) that though there has not been any marked diminution in the quantity of wine exported during late years, the character of the export trade has somewhat changed. Many old-established Bordeaux firms which formerly used to do a large export business in the better class of Gironde wines, have seen their transactions gradually reduced to a comparatively limited figure, in consequence of the annually growing difficulty, not to say impossibility, of

supplying their customers with sound and genuine clarets at prices which ruled ten years ago. On the other hand, a larger share than formerly of the Bordeaux wine trade has fallen into the hands of less scrupulous houses, who are less conscientious regarding the genuineness of the liquid which they supply to their customers, many of whom, it is true, often regard not so much the quality of the wine as a handsome and well-sounding label.

Difficulty of obtaining good claret at low prices.

Looking, however, to the results of the vintages in this district during the last three years, it may be fairly hoped, both in the interest of consumers and of the many respectable wine firms of Bordeaux, that it will now soon again be possible for the latter to furnish their customers, as in former times, with a sufficient supply of genuine and good wines grown in the Gironde department at a comparatively low figure.

More favourable prospects of wine export trade owing to recent vintages.

As regards the share taken last year in particular by the United Kingdom, in the wine export trade from Bordeaux, the preceding figures will have shown that there was a slight increase, amounting together to 325,072 gallons, in the shipments from hence to British ports of wines in wood and in bottles. Although only small, this augmentation must be regarded with some satisfaction, inasmuch as previous to last year there had been a gradual diminution in the annual shipments of wine from this port to the United Kingdom since the year 1880. The increase in the consumption of Bordeaux wines at home has been probably due to a great extent to the more favourable condition of trade during the last six months. The continuation of this improvement in trade being probable, and there being now a far greater stock of fairly good wines in the Bordeaux market in consequence of the plentiful yields of the last two years, a further augmentation of the shipments of Bordeaux wines to British ports may, it is thought, be confidently looked forward to for the present year.

Wine export trade to United Kingdom. Increased shipments to United Kingdom in 1889.

Prospects of wine export trade to United Kingdom considered favourable.

Amongst the other countries to which (as compared with the year 1888) increased shipments of wine were made last year from Bordeaux, were Germany, Russia, Sweden and Norway, Denmark, Mexico, Uruguay, British India, and especially the Argentine Republic; whilst there was a decrease in the shipments to Spain, Egypt, Brazil, and the United States of America, as also to other countries. The Argentine Republic is the chief customer of Bordeaux for so-called "Vins de Cargaison," i.e., wines of an inferior class made up at Bordeaux from the cheapest kinds of French, Spanish, and Portuguese wines; and formerly also of Italian wines; but the latter, owing to the cessation of the Franco-Italian commercial treaty, are now exported to South America direct from Italian ports. A certain proportion of the wines shipped from hence to the United Kingdom and other European countries likewise consists in "Vins de Cargaison," and many of these are, it is to be feared, sold (for instance, in England) as genuine Bordeaux. But 50 to 60 per cent. at least of all wines shipped from Bordeaux to British ports are doubtless the produce

Wine export trade to other countries.

Large shipments to Argentine Republic. "Vins de Cargaison."

At least half of all wine ex-

ported to United Kingdom is grown in Bordeaux district.

United Kingdom is the best customer for better class of Bordeaux wines.

Three-fourths of all French wines consumed in United Kingdom come from Bordeaux.

Increased consumption in United Kingdom of French wines.

of this district; and of these, again, one-fourth or one-fifth are wines of a superior class. In spite, therefore, of the much larger quantity of wines shipped from hence to South America than to the United Kingdom, the latter is by far the best customer of the Bordeaux wine export trade, as it consumes a much larger proportion of the best class of Bordeaux wines than any other country. Three-fourths of all French wines annually consumed in the United Kingdom are, in fact, supplied by Bordeaux, and from statistics recently published it would seem that, whilst the consumption of Spanish and Portuguese wines has, during the last 10 to 15 years, been gradually decreasing in extent, that of French wines is, on the other hand, augmenting at home. The annual consumption of French wines in the United Kingdom, which, 17 years ago, was 2,600,000 gallons less than that of the wines of Spain, amounted in the year 1889 to about 5,800,000 gallons. Of these, 4,054,545 gallons were red wines, chiefly imported from Bordeaux, and 1,723,594 gallons were white wines, the latter having experienced a slight decrease, and the former a small increase, compared with the previous year. From the decrease in the importations of French white wines, it is to be presumed that (probably owing to the recent increase in their price) the fashion of drinking champagne is now somewhat on the decline in England. Should this actually be the case, it would naturally be a favourable circumstance for the wine export trade of Bordeaux, as the consumption of claret would increase in proportion.

With regard to the wine import trade of Bordeaux during the past twelve months, it may be observed that there was a considerable decrease in the importations of all foreign wines, in particular of those of Italy and of Portugal, compared with the figures for the year 1888, as will appear from the following table, viz. :—

Wine: import trade to Bordeaux.
Decrease in importations of foreign wines.

Countries whence Imported.	Annual Importations of Wine in	
	1888.	1889.
	Gallons.	Gallons.
Spain	14,139,268	14,863,090
Portugal	18,585,666	13,698,344
Italy	3,023,988	319,638
Algeria	5,918,506	5,706,954
Other countries (chiefly Austria)	4,191,484	4,221,514
Total	45,858,912	38,809,540

Decreased importations of wine caused by abundant vintage of 1888.

The diminished importations from Italy were of course chiefly due to the effects of the cessation of the Franco-Italian commercial treaty; but, on the other hand, the general outfall last year in the importations of wine, both at Bordeaux and all other French ports, arose more especially from the comparative abundance of the vintage in France during the year 1888. It will, however, require a long run of plentiful vintages in this district to reduce

the importations of foreign wines to the figure they reached ten years ago; for instead of nearly 39,000,000 gallons (as in 1889), the same amounted in the year 1879 to only about 6,000,000 gallons.

The 1889 crop of plums in this district was 225,000 cwt. of Plums. medium-sized fruit, and was of excellent quality. As mentioned in my report of last year, the French export trade in this article has of late years been prejudicially affected by the large quantities of Bosnian and Servian plums put up in imitation of those packed at Bordeaux. During the past season French packers, being backed up by a favourable yield, determined however to put down their dangerous competitors just referred to by lowering their prices. In consequence hereof a very brisk trade took place here, and almost the entire crop was cleared off before the close of last year, either for home consumption or for exportation, more especially to the United States of America. Though values ruled lower than at any time since the Franco-German war (medium qualities selling at 21s. per cwt.), both growers and packers of plums appeared to be satisfied, transactions being extensive and returns quickly obtainable.

The crop of walnuts in 1889 was 30 per cent. smaller than in Walnuts. the preceding year. Though the quality was fairly good, yet the long continued damp weather in October and a great part of November interfered with the drying operations in an unfavourable manner, rendering business difficult, because it was attended with considerable risk. Shipments from hence were made unusually late and in reduced quantities, viz., only about 40,000 cwt. in all, against 65,000 cwt. in 1888. The average price was 16s. per cwt.

The frequently boisterous and generally cold summer weather Sardines. interfered with the sardine fishing last year, and the general results of the season, both on the Spanish and Portuguese as well as on the French coasts, were poor. The outfall last year in the total quantities of sardines, packed in all the packing centres, is estimated at 80,000 cases; but this falling-off can hardly be regretted by exporters, as it has paved the way for clearing off old stocks, and has had the effect of maintaining prices, so that packers here and elsewhere are able to look forward to a more remunerative business for next season. Towards the end of last year rumours were afloat, and considerable agitation was caused amongst all persons interested in the sardine trade by the news, that an attempt was being made to form a "syndicate" for acquiring all the packing establishments on the Atlantic seaboard. A number of large firms, in particular at Nantes, are stated however to have refused to dispose of their factories, and for the present, at least, the scheme has consequently come to nothing.

The importations of Senegambian gum, which amounted to Gum. only 23,000 bags in 1888, rose last year to 27,000 bags; but prices ruled generally somewhat lower than in the preceding season, owing to larger quantities of Egyptian and Eastern gums having been sent to Marseilles. Good qualities were, however,

cleared off during the year at remunerative prices, and but a small stock remained in the market by the end of December.

Rice. The situation of the rice trade at this port remains much the same as it was at the same period of 1888, imports of unhusked rice being unchanged in the interval. Only two shipments thereof, representing about 20,000 bags, arrived here last year. Of paddy about 4,000 to 5,000 tons were imported, and imports continue to decrease for the same reasons as stated in my last annual report.

Coffee. The state of the coffee crops during 1889 resembled very much, in general, that of the previous year. A good deal of speculation took place last year, especially in the Havre market, and prices rose considerably in consequence. Importations were much below those of 1888, and the stocks remaining on hand last December were very small. The revolution in Brazil does not seem materially to have affected the European coffee market; but, nevertheless, a certain uneasiness has lately been and is still observable.

Cocoa. There were few arrivals last year at Bordeaux, especially of Guayaquil cocoas; business in these latter brands being at a standstill. The growers have of late years been trying more and more to deal directly with consumers and to do away with middlemen, and to a certain extent they are said to have succeeded. The importations from the West Indies, from Venezuela, &c., were considerable; but prices, which during the first five months of the year had left a margin of profits for importers, gradually declined again, and stood about the same at the end of 1889 as in 1888.

Sugar. The beetroot crop having turned out under an average one, exaggerated speculation took place in this article at the beginning of last year; but, in view of the condition of the 1889 crop, prices did not maintain themselves, and they are now actually on a par with those of the preceding year. The opinion is that the next harvest will far exceed in quantity that of an average one, and, as the reports from the sugar-growing colonies are favourable, an increase of business in sugar is expected.

Hides. The import trade in hides may be classed on the same footing as that of the year 1888, but the future outlook appears to be more in favour of the importers. Prices were generally low during the first seven or eight months of last year, but became firmer towards December. The importation of hides to Bordeaux seems to be decreasing in extent, and this may in a great measure be attributed to the bad state of the market at this port itself.

Sheepskins. Very large shipments of River Plate sheepskins were received here in 1889, viz., 59,148 bales against 43,853 bales in 1888—a larger quantity, in fact, than arrived here during any one of the last five years. As in previous years, prices ruled higher at Buenos Ayres, &c., than in Europe; but a rise having taken place in the quotations of wool and skins on this side of the Atlantic the importations yielded more satisfactory results than

had been expected at the time when the purchases had been made abroad.

Upwards of 4,700 bales of Australian sheepskins were imported to Bordeaux last year direct from Australia, and at the end of the year the stock on hand here had been cleared off except about 200 bales. As an experiment, this article has been found to suit the wants of consumers in this part of France very well. The fine quality of the wool largely compensates, it is stated, for the generally inferior quality of the pelts; and it may be presumed therefore that in future a more important business will take place in this article at Bordeaux. The same remarks might possibly be made regarding Cape sheepskins, if direct communication were opened between this port and that portion of Africa.

Little can be added in so far as this article is concerned to what I stated in my last annual report. Trade here last year in dyewoods was quiet; and only about 150 tons of yellow wood, and from 1,200 to 1,500 tons of Campeachy were imported, chiefly from French West Indian colonies.

The exports of cork continued to be very indifferent last year as regarded North America, but trade to Brazil and the River Plate, as well as to countries on the Pacific Coast, was better, though labouring, as during previous years, under difficulty, owing to the competition of Spanish factories. On the whole business was of less importance than in 1888, but hopes of a brisker trade during the coming season are held out here. The exportations from Bordeaux in 1889 were as follows, viz.: Manufactured cork, about 19,840 cwts.; and unmanufactured cork of all kinds, about 5,930 cwts.

The state of trade last year in resin and turpentine remained very similar to that reported of the previous year. The production was slightly larger, and prices showed a rising tendency, which has been maintained here as well as in the North of Europe. Local production in this district has to suffer greatly from American competition, as already stated by me on former occasions.

The importations of coal during 1889 amounted to 388,314 tons, being a diminution of 50,872 tons, compared with the preceding year. Prices gradually rose after the beginning of January, and in the course of the year attained a very high figure in consequence of the demand being greater than the output. These high quotations caused considerable quantities of French coal to be sent to Bordeaux, and they found a ready sale here on account also of the reductions in the rates of carriage made by the railway companies. At the present moment, however, owing partly to the strikes in Belgium, and partly to the agitation in other mining districts, both French and English coal mines appear unable to supply the demands for either kind, and in spite of the very high prices, English as well as French coals are now much sought after at Bordeaux, and at certain moments even difficult to obtain.

The remarks made by me last year with regard to the

Bacon and
lard.

prohibition existing in France against the importation of American bacon and lard apply equally to the past year.

During the first months of 1889 a relative freedom was accorded to goods coming from Liverpool as English bacon, &c.; but in December this was no longer the case, and at the present moment the importation is suspended, or has become so difficult, on account of the restrictions imposed upon these goods when imported to Bordeaux (and presumably also at other French ports) by the customs authorities, that the import trade may be said to have virtually come to a standstill. Hams, however, continue to be admitted from England under far less restrictive laws. Though the inland production of France is insufficient for the wants of the country, prices stand at a relatively low figure—lower indeed, it is stated, than at any time since the import prohibition has been in force. Buyers at Bordeaux, in view of the difficulty of obtaining the requisite supply, are now obliged to import from producers in Austria-Hungary, Denmark, &c.

Lard.

Lard continues to be imported here, both direct and *via* England, without any special restrictions on the part of the French customs.

The harvest in this part of France having last year been below the average in quantity, further importations are evidently needed to make up for the outfall until next July. Prices have varied little so far, and may continue at the same rates unless considerable arrivals should take place at an early date. Up to the end of December the importations of wheat were quite nominal.

Oats.

The oat crop was a bad one in this district last year, as it was in general; and importations are eagerly awaited at present. Prices, in consequence of the very limited stock on hand, continue to have an advancing tendency.

Maize.

The Indian corn harvest was likewise an indifferent one here; on the other hand importations have been very extensive. Owing to this circumstance, and also to the generally shared opinion that a duty of 3 fr. per 100 kilos. (about 2 cwts.) will, at a near date, be imposed on maize imported into France, stocks were very heavy at the end of December. Prices then stood at an average figure.

Preserved peas
and beans.

A very abundant harvest took place last year in this part of France in vegetables and fruit of all kinds. The trade, particularly in peas and French beans—which, as is probably well known, are preserved and packed at Bordeaux in very large quantities—was very important in 1889; prices, however, were upon the whole moderate.

At the end of the year, one of the most important establishments of Southern France for packing vegetables and other provisions (at Bordeaux) was taken over, to the greater proportion, by British capitalists, and converted into a company with limited liability.

Preserved
mushrooms.

With regard to mushrooms, which are also preserved and exported here in large quantities, the almost entire failure of

last year's crop prevented a number of packers from putting up any in 1889.

The crop of olive oil in 1889 is estimated to have been about Olive oil. one-quarter of an average crop. In certain districts of Italy, *e.g.*, in Lucca, it was an entire failure; and, as regards France, the olives in Provence, Nice, and the department of Var also suffered very severely. In many districts, moreover, the appearance of the "canker" fly had a very prejudicial effect upon the quality of the oil. The exportations of olive oil from hence were less than in 1888, and importations showed a stationary figure compared with the preceding year. Prices are at present high for good qualities, these being used here chiefly for preserving certain provisions.

The stocks of chemical products increased here very considerably last year, and were readily disposed of at advancing prices. Chemical products. The more and more extensive use of certain chemical products for combating the effects of the phylloxera, mildew; oidium, and other cryptogamic diseases of the vine, is annually developing the import trade in such articles at Bordeaux in a very considerable degree.

Business in artificial manures is likewise every year increasing in extent at this port, in consequence of the growing demands of Artificial manures. the vineyard proprietors of this district, who are gradually giving up the use of natural manures.

A very considerable diminution took place in 1889 in the importations of wood for building to Bordeaux, the same having only Wood for building. amounted to 23,291 standards, against 35,083 standards in the preceding year. This decrease was chiefly borne by arrivals from Swedish ports; but there was likewise a diminution in the arrivals of spruce and pitch pine from New Brunswick and the United States of America. It is difficult to account for this gradual decline in the importations of one of the most important building materials, except by the fact, mentioned already in my last annual report, namely, that there has been a considerable diminution in the prosperity, more especially of the smaller class of vineyard proprietors, of this district during the last decade, in consequence of the heavy losses which so many of them have suffered by the devastations of the *Phylloxera*, and by a long series of unfavourable vintages.

The importations of codfish to Bordeaux, during the past Codfish. fishing period, were more extensive than during the preceding one; and in consequence hereof, as also of the dispensations accorded this year during the Lenten fasting season (the time when, as a rule, most codfish is consumed in this and other southern parts of Europe), a considerable stock still remains in the hands of importers, and prices are very low. With regard more particularly to the Newfound- importations at this port of codfish taken in Newfoundland waters land cod. by French fishing vessels, it may be interesting to note that during the last fishing season (*viz.*, from June 1, 1889, to July 25, 1890), the quantity of fish imported to Bordeaux was 4,556 cwts. more than that brought here during the preceding season. This will be shown by the following figures:—

Increase of
codfish impor-
tations in spite
of Newfound-
land prohibi-
tive law.

Season.	Number of Fish.	Weight of Fish in Cwts.
June 1, 1888, to February 25, 1889	15,481,393	471,895
June 1, 1889, to February 25, 1890	14,944,706	476,454

Prejudicial
effects of
prohibitive
law for New-
foundland
fishermen.

It is thus evident that (as I took the liberty to point out as probable in my last annual report) the French fishermen have now to a great extent overcome the difficulties caused to them at first by the prohibition which was put into force at the beginning of the year 1888 by the Newfoundland authorities against the sale of bait, and that, though of course the French fishermen are as much dissatisfied as before against this protectionist measure, they have found means of supplying themselves with bait before their departure from Europe, or in other ways. How far the prohibition of the sale of bait to French fishing vessels may have benefited the general interests of Newfoundland, I am unable to say; but it would certainly seem as if it had not had, nor is in future likely to have, the effect of driving away French competition. On the other hand it is, as observed by me already on a former occasion, to be feared that the measure in question has deprived, and will continue to deprive, a large number of the poorest class of Newfoundland fishermen—who used formerly to sell bait and other articles of daily use to the French vessels—of an important source of living. Bordeaux is by far the most important port of France for the Newfoundland codfish trade; and I may perhaps add that the strong feeling of the French fishermen against the prohibitive Newfoundland law is fully shared here by the importers, and that the modification of this law, which is considered here not only unfair towards the interests of the French fishing trade, but also prejudicial to those of a portion of the Newfoundland population itself, continues to be urgently called for at Bordeaux, as well as in other parts of France.

Bordeaux
branch of
Bank of
France.

Bank of France.—Amongst the provincial branches of the Bank of France that at Bordeaux held again, last year, the first rank in regard to the importance of its annual business operations, the latter having reached the total sum of 23,605,000*l.* sterling, a diminution, however, of 84,000*l.* compared with the figures for the year 1888. Next to Bordeaux, Lyons, Marseilles, Lille, Havre, and Rouen showed the greatest amount of business last year. The net profits realised at Bordeaux in 1889 were likewise more considerable than those obtained at any other branch bank; they amounted to 54,614*l.* against 34,400*l.* at Marseilles, and 24,780*l.* at Lyons. The total amount of deposits were, viz.: at Bordeaux 8,354,452*l.*, at Marseilles 6,412,000*l.*, at Lyons 5,760,000*l.*, &c.; shewing that, though less populous than the two latter, Bordeaux is the wealthiest town in France excepting Paris.

III. POPULATION AND INDUSTRY.

Population.

According to the latest official census the population of this town amounted to 240,582 persons, and Bordeaux thus holds the

fourth rank among the large towns of France as regards the number of inhabitants, the three more populous cities being Paris, Marseilles, and Lyons. During the last decade the population of Bordeaux has increased by about 10 per cent.; but inasmuch as the annual number of deaths has exceeded that of the births, the increase of population has been solely due to immigration from the surrounding districts of France and from foreign countries. The total number of foreigners residing at Bordeaux was, according to the official census of 1885, 7,052, or about 3 per cent. of the total population; amongst these there are stated to have been 900 British subjects, 3,000 Spaniards, 1,300 Germans, &c.

Increase of
population
due merely to
immigration.

The comparative number of births, deaths, and marriages during each of the last three years has been as follows:—

Births, deaths,
and marriages.

	1889.	1888.	1887.
Births	5,388	5,522	5,355
Deaths	5,708	6,157	5,947
Marriages	2,045	2,056	(?)

Of the 5,388 births during last year, 1,220 were illegitimate, against 1,248 in the year 1888. The greatest number of deaths, viz., 764, last year were caused by consumption of the lungs, and 491 deaths were caused by other pulmonary and chest diseases; 469 deaths were due to cerebral congestion or hemorrhages, and 400 deaths were caused by heart diseases. Upon the whole the health of the inhabitants of Bordeaux, in 1889, was a good one, and the comparatively favourable summer weather caused fewer choleraic maladies than usually occur during the frequently very oppressive heat of this district in July, August, and September. Towards the middle of December, influenza, which had previously appeared sporadically, assumed an epidemic character at Bordeaux, and in the course of the following five or six weeks attacked nearly a third of the entire population, but, with few exceptions, only in a mild form. Some physicians here have expressed the fear that the influenza epidemic will be followed by a marked increase of cases of typhoid fever—a disease which is, at all times, more or less prevalent at Bordeaux, and which two years ago prevailed for some months in an epidemic form. Though it is of course to be hoped that this opinion may prove to be a mistaken one, the sanitary condition of this town is unfortunately in some respects so unsatisfactory, that there may be said to be a constant local predisposition towards typhoid or other fevers assuming a rather virulent character.

Health of
Bordeaux.

Influenza.

Sanitary
condition of
town
unsatisfactory.

As already observed in my former annual reports, there are comparatively few large manufacturing establishments in this district, the inhabitants of which are for the greater part engaged in commercial pursuits, and more especially in some kind of business connected with the wine trade and production. Amongst the more important industrial establishments may be cited the

Manufactures.

Industry in
smaller
establish-
ments.

well-known pottery works, the Government tobacco factory, several machinery works, shipbuilding yards, chemical works, oil-mills and oil-refineries, biscuit factories, &c. Some other industries of importance are carried on by numerous small establishments or by workmen in their own homes; and amongst these may be mentioned particularly the preserving of vegetables, fruit, fish, and meats, the manufacturing of ready-made clothing, of liqueurs and cordials, and of a variety of articles such as capsules, corks, bottle-covers, casks, &c., used in the wine-trade.

Labouring
classes, rates
of wages.

According to a report recently drawn up by representatives of the Gironde, who attended the Paris Exhibition, the rates of wages in the various branches of trades and industry, in this department, have during the last 30 years increased by about 30 to 40 per cent. During the last few years, however, a slight diminution in the same has taken place, in consequence more particularly of the depression in many industries connected with the wine production, which, as often stated, has been very prejudicially affected by phylloxera, mildew, and other causes. But it is nevertheless considered that the general condition of the working classes at Bordeaux, and in the surrounding district, is not such an unsatisfactory one as is frequently asserted. For it may be stated that, during the period from 1880 to 1887, the aggregate amount deposited by members of the working classes in the public savings banks of the Gironde department (the population of which is about 790,000 persons) rose from 277,300*l.* to about 619,000*l.*

Increase of
rate of wages
during the
last 30 years.

General
condition of
working
classes
satisfactory.

Mutual
associations
amongst
workmen.

A further proof of the increase in the general well-being, and also of the thrifty character of the working classes of this district, is given by the rapid development of the numerous associations formed for the purpose of mutual aid in case of accidents, illness, or death. The total number of these mutual associations is about 500, of which 403 comprise exclusively male members, 38 only females, and 59 members of both sexes. The aggregate capital belonging to all of these associations—which are established not only in the larger towns, but in all parts of the department—amounts to about 110,000*l.*

Professional
syndicates
amongst
working
classes.

The growing tendency amongst artisans and workmen of this part of France to join together for the purpose of mutual protection of their respective interests has, moreover, during the last five years found prominent expression in the formation of numerous so-called professional syndicates amongst the various classes of workmen themselves, as well as amongst their employers. These syndicates are formed by the election of representatives, who are charged with the care of the economical, industrial, and commercial interests of each trade, as also with the settlement or arbitration of disputes which may arise amongst the workmen themselves, or between the latter and their employers, and with providing situations for the members. The various syndicates of the workmen (similarly to the employers' syndicates) are, again, for general purposes represented by one joint syndicate.

With regard to co-operative societies amongst the working classes in this district, formed either for the purpose of production or consumption, these have not met with much success either at Bordeaux itself, or in the smaller towns. In the latter, however, these societies are stated, upon the whole, to have succeeded better than in this city, owing to there being less competition amongst retail dealers, and prices of articles of daily consumption, for instance, not being kept at the lowest possible figure, as is the case in a large town like Bordeaux.

Co-operative societies amongst workmen.

It should finally be observed that the efforts made of late years by the working classes of this town and district towards promoting their own interests in an intelligent and efficacious manner, and the beneficial results already attained thereby, are to a considerable degree doubtless also due to the judiciously organised means of education, and to other assistance provided for these classes, both by the municipal authorities and by several private philanthropic institutions at Bordeaux. I may perhaps, however, add that the so-called "Labour Exchange," recently established here by the municipality for the use of the various syndicates of employers and employed amongst the working classes, when holding their periodical meetings, &c., does not appear to have met with the approval of the workmen's syndicates. Many of these latter have refused the offer of holding their meetings in localities subject to the direct supervision and control of the authorities.

Efforts of working classes towards promoting their interests assisted by municipality and private institutions. Labour Exchange.

The delegates of the several trades and industries represented at the working men's congress, held at Bordeaux in 1888 (as mentioned in my last annual report), submitted last February to the Préfet of the Gironde department a statement of the resolutions passed by the congress, and requested him to lay the same before the French Government. These resolutions consisted in a series of demands for Government assistance towards attaining the following points, viz.: the passing of a law fixing the minimum rate of wages, and the duration of a working day; the passing of sanitary laws in respect of the condition of workshops; the prohibition of night work in certain trades, and of payment by piecework in all trades; the abrogation of the law suppressing the so-called "Internationale"; the framing of international laws for regulating labour questions; the assimilation of the rate of wages for male and for female labour; the prohibition of work on Sundays and holidays; and the revision of the existing laws regarding the public maintenance of infants and aged persons.

Resolutions by Bordeaux working men's congress.

Demands for Government assistance.

The activity of the Bordeaux police authorities during the year 1889 is shown by the following statistics, viz. :—

Bordeaux police.

	1888.	1889.
Number of crimes and misdemeanours committed ..	3,747	3,932
„ contraventions of police regulations ..	8,712	9,608
„ arrests made by Bordeaux police ..	5,114	5,355
„ sentences (fines and imprisonment) by ditto	12,182	13,644

Considering that the total number of police officers employed in this town—which, as mentioned, contains more than 240,000 inhabitants, and which covers a comparatively very large space of ground—was only 353 officers (in uniform) and 77 detectives, the annual amount of work done by them must be considered very commendable, especially when it is added that the total cost of the Bordeaux police establishment last year did not exceed 33,200*l.* sterling. It should however be observed that, in view of the gradual increase of the number of inhabitants and of the size of the town, as well as of the recent augmentation of all kinds of infractions of the law, many complaints are now heard here regarding the present insufficient numerical strength of the police force of Bordeaux.

IV. PUBLIC WORKS.

Works for improving port and river.

The works for improving this port itself, as well as those intended to improve the condition of the river between Bordeaux and Pauillac, were continued during the past year, though not at so rapid a rate as could be wished, both in the interest of Bordeaux itself and in that more particularly of the shipping visiting this port, which latter is at present already obliged to pay for these prospective advantages in the shape of largely increased tonnage dues.

New navigable channel for sea-going ships.

A new and deeper navigable channel for sea-going ships ascending the river Garonne as far as Bordeaux was established in spring by the Government, at the urgent demand of the Bordeaux Chamber of Commerce, in place of the old channel which, as mentioned in my last annual report, had gradually filled up to such a degree as to render navigation for larger vessels dangerous. It is, however, feared by some persons that the limited sum allotted for the expenses of the dredging of this new channel will be insufficient for enabling the same to be maintained in a proper condition for the future.

New stone embankment.

The construction of about 1,700 yards of new stone embankment along the left bank of the river in Bordeaux harbour was commenced last year, and will, it is hoped, be finished in about three years. The completion of this work will be of much benefit for British and other vessels visiting this port, as the existing stone quays are quite insufficient in extent for the annually increasing number of steamers, especially for those that arrive and sail regularly at fixed intervals.

Electric lighting of dock entrance.

The entrance to the wet-dock at Bordeaux is now lighted at night time by electricity, and it is to be wished that this kind of light could be also established in all other parts of the harbour, where shipping business has frequently to be carried on after dark.

Franco-Spanish Railway.

The Spanish portion of the two railway lines, viz., one through the Canfranc, and the other through the Noguera Pallaresa Valley, which, after traversing the central portion of the Pyrenees at two different points, will connect the north of Spain more directly than at present with Bordeaux and other parts of south-western

France, is being now built. How far the commercial advantages expected from the completion of these railways will be realised remains to be seen; but the Noguera Pallaresa line will certainly considerably shorten the distance between England and Algiers, as travellers will be able to proceed all the way from Calais to Carthegena by rail, and will then have only a very short passage from thence by sea to Algiers.

Shortening of distance between England and Algiers.

The connection of the Médoc railway, which traverses the country comprising most of the finest vineyards of France, with the lines already existing along the river banks at Bordeaux, and communicating with those of the Southern and of the Paris-Orleans railway companies, has recently been decided upon, and will soon be taken in hand.

Connection of Médoc railway with quay lines at Bordeaux.

The telephone lines in this and other parts of France having last September passed out of the hands of the private companies to whom they belonged into those of the State, the Bordeaux telephonic system is now worked by the Government postal authorities. The number of annual subscribers who use telephones at present in this town is about 450, the annual subscription being about 12*l*.

Telephones at Bordeaux taken charge of by postal authorities.

The long-projected telephonic communication between Bordeaux and its outport of Pauillac, which will be of much use for shipping, is about to be opened.

Telephone from Bordeaux to Pauillac.

A large new lunatic asylum for females, which has cost about 100,000*l*., is about to be opened by the municipality of Bordeaux, and will be a great improvement upon the very antiquated establishment used hitherto.

Female lunatic asylum.

V. GENERAL REMARKS.

The consideration of the question as to whether the various treaties of commerce concluded between France and other countries, and expiring in February, 1892, shall be renewed or not for a further period by the French Government, and if so, under what modifications, is one of the chief tasks imposed just now not only upon the French Legislative Assembly, but also upon the various commercial and other public bodies in this country. The Bordeaux Chamber of Commerce, in answer to a recent circular from the French Minister of Commerce demanding the views of the various commercial chambers of France on this question, has already expressed its opinion to the effect that the French Government should abrogate all treaties of commerce concluded at present with other States, but that it should take the proper measures for replacing the same, when they expire, by other more judiciously framed treaties. The modifications which it desires to see introduced by the future treaties have not yet been set forth by the Bordeaux Chamber; but there can be little doubt, in view of the comparatively liberal commercial opinions held here on most questions, that in so far as the proposals of the Bordeaux Chamber are concerned these will bear upon the whole an anti-protectionist character.

Question as to renewal of treaties of commerce.

Opinion of Bordeaux Chamber of Commerce.

Bordeaux Chamber of Commerce recommends conclusion of new treaties.

Strongly marked protectionist ideas in other parts of France.

Effect of future commercial policy of France on trade of Bordeaux.

Projected import duty on maize. Opinion at Bordeaux.

Proposed import duties on molasses and hemp. Opinion at Bordeaux.

Proposed Chambers of Navigation.

Bordeaux exhibitors at Paris International Exhibition.

Considering, however, on the other hand, the strongly-marked and increasing tendency towards protectionist ideas and wishes, both amongst public bodies and private individuals in most other parts of France, it would seem far from likely that the recommendations made by Bordeaux in the direction of free trade will have any chance of being adopted, when the time arrives for definitely deciding anew the future commercial policy of this country. In view of the extensive trade carried on at present between Bordeaux and the United Kingdom, and likewise in the interest of this port itself, it must be hoped (though the hope appears vain) that the French Government, which of late years has been endeavouring to promote the trade of this port by building new harbour works, railways, &c., may not, under the idea of conferring a benefit thereby upon its own citizens, raise up barriers against the development of the very commerce which they have been and are still trying to stimulate by other methods.

The Bordeaux Chamber of Commerce, in December last, sent a strong protest to the French Government against the project of establishing an import duty in this country of 3 fr. per 2 cwts. on Indian corn and Indian cornflour, a measure which it considers opposed to the interests not only of the shipping trade, but also of the distillers and the agriculturists themselves in this part of France. The duty in question appears, however, on the point of being introduced.

Representations have also recently been made by the commercial classes of this port against the project of creating import duties in France on foreign molasses and foreign hemp, it being thought here that the consideration of questions of this kind should now be deferred until the general revision of the French customs tariff will be made in connection with the question regarding the abrogation of the treaties of commerce.

The project of establishing Chambers of Navigation in all the larger towns of this country, with the more particular object of promoting the interests of inland navigation, and which, after being brought before the French Chambers last year by the member for Havre, has since been submitted for their opinion to the various French Chambers of Commerce, has not found any favour at Bordeaux. It is considered here that Chambers of Navigation are not only unnecessary in view of the existing organisation of the Chambers of Commerce, but that their establishment would, in many respects, interfere with the action of the former.

Bordeaux was very fairly represented last year at the Paris Exhibition, and the number of gold and silver medals awarded, more especially to the wine-growers of this district, would be difficult to count. The chief exhibits sent from this town, and from the Gironde department generally, were a collection of samples of all the more important wines produced in this department, some views and plans of the town and harbour of Bordeaux, and a carefully-executed model of the docks, warehouses, and other establishments managed by the Chamber of Commerce at

Foreign
wheat.

There was a large importation of wheat in 1889 imported in English vessels :—

	Cargoes.	Tons.
From Roumania	8	16,190
America	3	5,050
Russia	7	17,500
Bulgaria	1	1,760
In 1889 total imported in English vessels	..	40,500
1888 " " " "	..	18,088
In 1889 increase	..	22,412

Exportations
in British
vessels to
Great
Britain.

There were exported to Great Britain in 1889 in British vessels :—

	Quantity.	Value.
	Tons.	£
Pitprops	2,430	3,646
Zinc ore	1,520	7,600
Oak sleepers	90	200

Exportations
in British
vessels to
foreign
countries.

There were exported to foreign countries in British vessels in 1889 :—

	Quantity.	Value.
	Tons.	£
To South America, steel rails ..	3,500	19,000
Turkey, steel rails	1,650	9,900
Portugal, railway sleepers ..	1,050	1,100
Germany, resin	150	420

TABLES showing the Foreign Commerce of the Department for 1887-1888. (See Annex 2.)

Population.

Population, 26,563, garrison not included. Births, in 1889, 515; in 1888, 509; increase, 6. Deaths, in 1889, 556; in 1888, 657; decrease 101. The general health has been good. Epidemic of influenza was light. The garrison of 1,439 men did not suffer.

Industries.
Zinc ore.

There were 2,000 tons of zinc ore exported to Messrs. Richardson and Co., Swansea, agents of the English Crown Spelter Company, London, from the Anglas Mine, on the south-west slope of the Gers Mountain, Pyrenees, at about 6,500 feet above the sea level, owned by Le Société des Mines d'Ars et d'Anglas, of Lyons, with whom the English Company have contracted for the purchase of the whole of the output of their mines for several years.

The mine can only be worked from May to November. The crude ore contains about 28 per cent. of zinc; but, as delivered at Bayonne, after having been crushed and washed at the foot of the mountain, it contains, on an average, 50 per cent. of pure zinc.

The ore has to be carted from the mountain about 7 miles, then is brought by train to Bayonne, about 75 miles. Price in railway truck, average per ton, 5*l.*, based upon a sliding scale, following the price of zinc in London, and the richness of the ore in zinc.

Ironworks at Le Boucau have in hand a contract for 30,000 tons of steel rails for South America at 6*l.* per ton; are to deliver 1,000 tons a month, beginning in May; 5,500 tons have been delivered. Ironworks at Le Boucau.

PUBLIC WORKS.

Public works.

The first section of the St. Jean-Pied-de-Port Railway to Cambo will be opened during the year.

HARBOUR AND PORT WORKS.

Harbour and port works.

No new works were undertaken during the year.

The graving dock advances but slowly.

The south pier at entrance of the Adour is being carried out beyond the bar. The channel has shifted, which renders entry uncertain with a rough sea.

Vessels drawing over 18 feet can enter at high tides, with a moderate sea.

Annex 1.—RETURN of British Shipping at the Port of Bayonne in the Year 1889.

ENTERED.

	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
1889	4	310	93	62,762	97	63,062
1888	5	499	82	46,991	87	47,490
Increase ...	...	...	11	15,761	10	15,572
Decrease ...	1	189	...	...	...	...

CLEARED.

	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
1889	4	310	92	61,626	96	61,936
1888	5	499	82	46,991	87	47,490
Increase ...	...	...	10	14,685	9	14,446
Decrease ...	1	189	...	...	...	...

RETURN of all Shipping at the Port of Bayonne in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
French	252	18,132	265	117,835	517	135,967
Spanish	156	7,683	117	24,559	373	32,242
German	3	332	1	406	4	4,738
Belgian	...	...	14	5,435	14	5,435
Norwegian	3	806	6	2,048	9	2,854
Austrian	2	558	2	751	4	1,309
Russian	1	232	...	...	1	232
Dutch	4	307	1	62	5	369
British	421	28,050	406	151,096	827	179,146
...	4	310	93	62,752	97	63,062
Total in 1889 ...	425	28,360	499	213,848	924	242,208
" 1888 ...	389	35,369	444	184,638	833	220,007
Increase	36	...	55	29,210	91	22,201
Decrease	...	7,009	...	...	...	...

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
French	254	18,343	262	116,299	516	134,642
Spanish	172	8,928	130	32,577	302	41,505
German	3	331	1	406	4	737
Belgian	...	...	14	5,435	14	5,435
Norwegian	2	558	6	2,048	8	2,606
Austrian	...	...	2	1,129	2	1,129
Russian	1	232	...	...	1	232
Dutch	...	...	...	...	...	...
British	432	28,392	415	157,894	847	186,286
...	4	310	92	61,626	96	61,936
Total in 1889 ...	436	28,702	507	219,520	943	248,222
" 1888 ...	396	29,532	451	186,515	847	216,047
Increase	40	...	56	33,005	96	32,175
Decrease	...	830	...	...	...	...

Annex 2.—BAYONNE Principal Foreign Imports.

Description of Goods.	Country from which Imported.	Unit of Measure.	Importations.	
			1887.	1888.
Horses	Spain	Head ...	92	167
Cattle	"	" ...	196	24
Sheep	"	" ...	370	4,301
Pigs	"	" ...	85	16
Fish, sea and salt	"	Kilos. ...	2,904,091	2,736,356
Grain and flour	America, Russia, Roumania, England	Quintal ...	202,845	235,767
Lemons, oranges	Spain	Kilos. ...	471,358	667,984
Sugar	Martinique	" ...	2,002	3,747
Cocoa	Venezuela	" ...	54,934	45,375
Coffee	Brazil, Cuba	" ...	131,081	141,857
Petroleum	Spain	" ...	74,124	15
Coal	England	Quintal ...	1,267,673	1,418,611
Pig iron	Belgium	Kilos. ...	160,359	30,568
Wine	Spain	Hectolitre	724,254	572,429
Liqueur	"	" ...	1,451	1,705
Metal	"	Gramme ...	177,290	87,045
Gold, coin	"	" ...	199,910	22,808,000
Metal	"	" ...	18,630,620	248,850
Silver, coin	"	" ...	2,590,932	1,086,600
Hides	"	Kilos. ...	1,070,226	1,071,423
Fleeces	"	" ...	2,182,290	1,832,097
Bones	"	" ...	...	21,322
Vegetables (preserved)	America, Spain	Quintal ...	...	...
Jute	England	Kilos. ...	640,909	492,617
Rags	Spain	" ...	...	103,643,263
Iron ore	"	" ...	90,062,423	23,991
Olive oil	"	" ...	35,978	...

BAYONNE Principal Foreign Exports.

Description of Goods.	Country to which Exported.	Unit of Measure.	Exportation.	
			1887.	1888.
Horses	Spain	Head ...	661	630
Mules	"	" ...	6,063	9,772
Salt meat	"	" ...	10,651	15,742
Grain and dried vegetables	"	Quintal ...	9,118	14,491
Sugar	"	Kilos. ...	2,216	...
Resinous products	Spain, England, Germany	" ...	15,043,151	12,859,733
Timber	Russia	" ...	107,812	102,373
Marble work	Spain, Africa, England, Portugal	Tons ...	30,017	32,734
Coal and coke	Spain	Kilos. ...	1,476	4,852
Chemicals	"	Quintal ...	535,986	612,661
Wine	"	Kilos. ...	6,129	5,030
Textile fabrics—				
Linen	England, Spain, Belgium	Kilos. ...	59,611	69,592
Silk	Spain	" ...	66,356	79,729
Cotton	"	" ...	524,515	424,455
Metal—				
Pig iron	"	" ...	449,934	415,804
Cast "	"	" ...	1,153,431	1,369,227
Copper utensils	"	" ...	260,494	287,132
Basket work	"	" ...	109,025	159,309
Haberdashery, &c.	"	" ...	419,794	446,118
Gold—				
Metal	"	Grammes...	12,310,000	...
Coin	"	" ...	3,754	8,235
Silver—				
Metal	"	" ...	16,540	...
Coin	"	" ...	329,000	614,000
Furniture	"	Francs value	330,333	382,650

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ON THE
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REFERENCE TO PREVIOUS REPORT, Annual Series No. 490.

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FRANCE.

CALAIS.

Consul Bonham to the Marquis of Salisbury.

My Lord,

Calais, April 1, 1890.

I HAVE the honour to transmit to your Lordship, herewith enclosed, the Report for the year 1889 on the Trade of the Ports of Calais and Boulogne and of my Consular District, which comprises the Departments of the Nord (except Dunkirk), the Pas-de-Calais and the Somme.

I have, &c.

(Signed) E. W. BONHAM.

*Report on the Trade of Boulogne, Calais, and Consular District
for the Year 1889.*

TRADE AND COMMERCE.

The usual tables relative to imports and exports at the two ports will be found in Annexes Nos. I. to IV., the figures contained in them have been furnished me by the customs authorities with their usual courtesy.

The virtual completion and opening of the new harbour and large floating dock at Calais, has not as yet had the effect of attracting trade to this port, it must take time before vessels resort here; the appliances, in the way of warehouses, cranes, &c., are excellent, and the prospect of quick despatch cannot fail to attract shipping to this port. The passenger traffic, of which I speak later on, was greater than it ever has been, which is attributable to the Paris Exhibition.

As to Boulogne, I have to report the cessation last autumn of the line of steamers, of the General Steam Navigation Company, between it and London, when the transit agents, who were in the habit of shipping goods by this line, formed a syndicate, and hired two vessels to run between these ports, but whether they will succeed in establishing a regular line is doubtful, it is rumoured that so far the result has not been encouraging.

In June last the large transatlantic steamers under Dutch flag, belonging to the American Netherlands Steamship Company,
(860)

running weekly between Rotterdam and New York, commenced calling off the port on their outward and homeward voyages for the purpose of embarking and landing passengers; a tug going out to meet the vessel which remained off the port only just the time requisite for transshipping passengers; they neither bring nor take cargo, the passengers consists chiefly of emigrants from Switzerland and Italy, who are brought there by rail at a special reduced rate.

A line of steamers belonging to the same Company, running monthly between Amsterdam and the River Plate, commenced calling at that port last November, these vessels enter the dock, they also take emigrants, and fill up with general cargo, their inward cargo destined for Boulogne consists chiefly of wool.

Equivalent of
weights.

In the tables attached to this report, the tons given are all tons of 1,000 kilos., or 2,204 lbs. avoirdupois.

IMPORTS.

Imports. The weight of imports shows a heavy decrease at both ports.

Boulogne.

Iron ore. I doubt, however, whether the diminished weight would show a smaller value, if the values were taken; more than half of the loss in weight is accounted for by the cessation of the import of iron ore from Bilbao. I stated in my last report that the steamers bringing this mineral destined for the steel works at Isbergues had ceased to come to this port, and were to go to Dunkirk as more favourable rates had been obtained through that port.

Timber. There was a decrease in 1888 in the quantity of timber imported from the Baltic and Norway, and a reference to table I. will show that a still larger decrease occurred last year.

Pig-iron. The import of pig-iron has fallen, but the quantity imported in 1888 was exceptionally large, it was only 214 tons in the previous year. Several small British sailing vessels arrived with old railway iron from England, destined from the works at Marquise.

Coals. There is an appreciable decrease in the quantity of coal.

Jute. As I anticipated in my last report there is a large increase in jute, this comes direct from India for the mills of Messrs. Sant Frères, in the Department of the Somme. One French and four British sailing vessels arrived with it last year, and so long as it can reach its destination through this port at less cost than by any other, almost the same quantity will arrive annually.

Sea-fish. The decrease in the quantity of sea-fish, which comes from England is again considerable; in spite of this the local fishing interest would wish to see the existing import duty increased.

Machinery. It is satisfactory to note that the slight increase which occurred in the weight of machines and machinery imported in 1888, was followed last year by a still greater one, these come from England.

Calais.

Last year I reported an increase in the weight of imports, but this year I have to report that the figures for the past twelve months show a considerable decrease, and are even less than in 1887.

The increase in the quantity of pig-iron, which I noted in my last report, has not been maintained, though the difference is trifling. Pig-iron.

The yearly decrease in the quantity of British coal still continues. Coal.

The most satisfactory item is the increase in weight of machines and machinery to 1,213 tons, from 689 in the previous year. Machinery.

Although the quantity of beer shows an increase at Calais as well as at Boulogne, at neither port has it reached the figures of 1887. Beer.

There is a falling-off in all kinds of yarns and tissues, although the quantity of raw cotton has increased, this is little more than half what it was in 1887. Tissues and yarns.
Raw cotton.

There is a marked decrease in petroleum, this must be accounted for by the loss of the tank steamer, "Ville de Calais," which was specially built for and employed in bringing petroleum to this port, this vessel was completely wrecked by an explosion which occurred on board of her in October, 1888, whilst laying in the harbour, but another vessel has now been built to take her place, and this import should show a large increase in future. Petroleum.

The increase in timber noted last year has not been maintained, although the figures exceed those of 1887. Timber.

EXPORTS.

At Boulogne we have a decrease and at Calais an increase in the weight of exports.

Boulogne.

The chief article of local produce or manufacture shipped from this port is Portland cement, in 1889 the large increase of the previous two years was not maintained. Portland cement.

We have a very marked decrease in the quantity of wine exported—by Calais there was also a decrease; but in spirits there is a slight increase here and a large one at Calais. Wine.
Spirits.

We have a further increase of articles in cast-iron, these are chiefly iron pipes, but also some street lamp-posts made at Marquise, they go principally to Portugal, but some have gone to Holland. Cast-iron.

There is a great falling-off in the quantity of fresh sea-fish exported, and in potatoes the decrease has been very marked, 399 tons against 1,810 in 1888, and 3,019 in 1887, they were formerly an important article of export. Fresh sea-fish.
Potatoes.

A large quantity of pressed straw is exported from this port to England, but the returns furnished me by the customs do not give the weight. Forage.

Calais.

Fresh fruit.	There is an increase in fruit and cut flowers, but a decrease in
Vegetables.	fresh vegetables.
Wine.	Wine, which had improved and was nearly up to former
Spirits.	average, shows a perceptible decline last year, but in spirits the
Forage.	increase has not only been maintained but greatly exceeded.
	The export of forage, which is chiefly pressed straw, shows a
	considerable increase, and is all sent to England, some of the
	better quality being for use in paper mills.
Osiers and	The weight of osiers has continued to increase, whilst that of
basket-work.	basket-work is on the wane.
Eggs.	The quantity of eggs has increased considerably, that of
Poultry.	poultry very slightly.

SHIPPING AND NAVIGATION.

Shipping at
Boulogne.

The shipping returns for Boulogne are given in Annexes V. and VI., and are compiled from information furnished me by the customs, they show a slight increase in the total number of vessels visiting the port, and a large increase in the tonnage; but in these figures are included 56 Dutch steamers, with a tonnage of 130,825 tons, of which 54, I believe, belonged to the line of steamers running between Amsterdam and New York, already referred to, which only call off the port for passengers, but do not enter the harbour, although their tonnage is included; they received or landed 2,581 passengers, but no cargo.

The number of British sailing vessels and steamers both show an increase.

In British sailing vessels there had been a steady decrease until 1888, when the number increased, this was again the case last year, 27 came from England with cargo and ten in ballast; four large vessels arrived from Calcutta with jute, and one from Norway with timber.

Of British steamers, 897 were from Folkestone, being the passenger and cargo steamers belonging to the South-Eastern Railway Company; this is against 817 in 1888, and 755 in the previous year. There were some extra passenger boats on account of the Paris Exhibition traffic, but extra cargo boats were also run; 198 steamers arrived from London, against 179 in the previous year; the bulk of these belonged to the General Steam Navigation Company, which has now given up the line, but for several months in summer a competing passenger steamer, specially for excursionists, was put on, but I understand the experiment did not prove a success, the competition led to greatly reduced fares and caused loss to both companies. 168 cargo steamers arrived from Goole, between which and this port there is a regular service, generally three times a week; only three arrived from the Baltic with timber; most of the other steamers brought coal.

Shipping at
Calais.

The return of vessels visiting Calais, which forms Annex VII. to this report, shows that the number of steamers under British

and French flags increased considerably last year, this was caused by the greater number of voyages between Dover and Calais made by the London, Chatham, and Dover Railway Company's vessels; as there are now four regular mail or passenger services daily, besides special packets and the daily cargo boat, these services account for over 1,900 of the steamers visiting the port.

29 British steamers arrived from Norway and the Baltic with timber; there is a weekly line from Goole, a line twice weekly from London, and the remainder were chiefly from Great Britain, with coal or pig-iron.

There is a considerable decrease in the number of sailing vessels: the British fell from 33 to 13, one of which arrived from Florida with pitch-pine; Norwegian fell from 76 to 40, and Russian from 43 to 26, this is owing partly to a decrease in the import of timber, but chiefly to British steamers being more generally used in this trade to the exclusion of Norwegian sailing vessels; of British vessels, all but eight cleared for British ports.

AGRICULTURE.

This has formed the subject of a separate report.

Population.

POPULATION AND INDUSTRIES.

The following figures give the movement of the population during the last four years:—

Department and Years.	Births.	Marriages.	Deaths.	Excess of Births over Deaths.	Divorces.
Nord (population, 1,670,184):—					
1885	50,539	12,161	35,379	15,163	140
1886	50,680	11,926	36,375	14,305	104
1887	49,247	12,137	34,850	14,397	136
1888	49,541	12,866	36,692	12,849	162
Pas-de-Calais (population, 853,526):—					
1885	25,763	6,216	18,962	6,831	51
1886	25,890	6,613	20,196	5,694	38
1887	25,388	6,064	17,598	7,790	43
1888	25,497	6,224	18,112	7,385	84

In the last year there is, curiously enough, an increase in the number of births, marriages, and deaths in both departments, and also in divorces, especially in the Pas-de-Calais, but I would point to the most notable feature, which is the decrease in the excess of births over deaths.

Taking the census of 1886 as a basis, we have the following birth and death rate per 1,000:—

	1886.	1887.	1888.
Nord:—			
Births	30·34	29·48	29·66
Deaths	21·07	20·86	21·96
Pas-de-Calais:—			
Births	30·33	29·74	29·87
Deaths	23·66	20·61	21·22

As the number of foreigners, especially of Belgian nationality, in the Department of the Nord is very large, the following analysis of births and deaths in 1888, divided according to nationality, may be of interest:—

BIRTHS.

Nationality.	Legitimate.	Illegitimate.	Total.
French	36,395	4,752	41,147
British	28	2	30
German	25	6	31
Belgian	7,234	935	8,219
Spanish	4	..	4
Italian	23	5	28
Swiss	17	1	18
Other.. .. .	52	12	64
Total	43,778	5,763	49,541

DEATHS.

Nationality.	Males.	Females.	Total.
French	17,307	15,349	32,656
British	13	12	25
German	15	10	25
Belgian	2,162	1,767	3,929
Spanish	1	..	1
Italian	9	6	15
Swiss	5	4	9
Other.. .. .	23	9	32
Total	19,635	17,157	36,692

Fisheries.

Fishing is the great industry of this port, and this, with the curing of herrings, gives employment to a large portion of the population, it is therefore much to be regretted that the statistics which used to be printed in the shape of a little pamphlet should no longer be obtainable.

At certain periods of the year fresh sea-fish is imported from England, this is when a particular kind of fish is abundant there, but not so in France; this fish is not imported for local consumption, but to be sent inland, chiefly to Paris. On the other hand, at some seasons when fresh herrings happen to be cheaper

here than in England, they are frequently sent over in considerable quantities to Folkestone for London.

The following table gives the weight in kilos. of fish imported during the past two years:—

	1888.	1889.
Herrings, fresh	277,264	437,163
Mackerel, „	204,352	65,111
Other fish, „	722,538	517,353
Herrings, salted	53,175	..
„ smoked	5,331	2,980
Other salted or smoked fish ..	20,785	50,493

A duty of 5 fr., or 4s., the 100 kilos. is levied on all fresh sea fish imported from abroad, and the persons engaged in the fishery here are calling out for it to be increased, so as to give further protection to their industry; it is the usual cry for protection which is being made by all kinds of trades and industries in France, but it should be borne in mind that, profiting by the fact of their being no customs duty in England, fresh herrings are, as I have already stated, sent from this to Billingsgate Market every season.

The largest monthly import of herrings was 117,466 kilos.; of fresh mackerel, 27,069 kilos. were imported in April, and 15,591 in October. The import of other kinds of fish was regular, except during the months of April, May, and June, when no salt or smoked fish was imported; all the fish came from England.

The quantity of fish sent off by rail from Boulogne during the last two years was as follows:—

	1888.	1889.
	Kilos.	Kilos.
Fresh fish	12,725,186	11,624,675
Salted „	16,892,527	14,934,590
Shell-fish.. .. .	655,611	478,424

The following table gives the known results of the Boulogne fishery in 1888:—

Kinds of Fish.	Weight.	Value.
	Kilos.	£
In boats:—		
Cod, Iceland	79,000	1,792
„ Doggerbank	840,200	8,410
Herrings, salted on board..	13,888,100	117,750
„ fresh	9,448,200	131,928
Mackerel, salted on board..	2,072,200	35,491
„ fresh	260,250	5,612
Other fresh fish	5,556,660	173,632
Oysters	10,200	100
Crustacea, lobsters, &c. ..	4,600	184
Shrimps	32,890	405
On foot:—		
Fish and shell-fish	480,600	8,940
Total	82,673,700	484,244
„ in 1887	34,853,556	460,923
„ in 1886	36,569,556	408,855

It appears from the information given in the above table, that whilst the weight of fish caught is returned as steadily decreasing the value of the take is as steadily increasing. In 1888 only one vessel measuring 142 tons was employed in the Iceland cod fishery, and 32 vessels measuring 2,042 tons in that fishery on the Doggerbank in 1889—the number in these fisheries fell to 14 ships measuring 882 tons. No vessel was fitted out for the Newfoundland fishery.

The above figures refer to the maritime district of Boulogne, which is the principal port, but are divisible as follows:—

Ports.	Value of Produce.
	£
Boulogne	427,365
Audressells	969
Le Portel	9,823
Equihen	13,104
Etaples	32,978
Total	484,244

The estimated weight and value of fish taken in the Calais district in 1888 is stated as follows:—

		Quantity.	Value.
			£
Fish sent away	Kilos. ..	1,686,700	40,023
„ consumed, locally	„ ..	168,670	1,687
Fresh herrings	Mesures ..	20,270	1,622
Total in 1888.. ..			43,332
„ „ 1887.. ..			41,654

The value of the fishery at Berck and Merlimont, also in the Pas-de-Calais, is stated to have been 28,047*l.* in 1888, against 31,150*l.* in the previous year.

The number of sugar factories at work in the Pas-de-Calais Sugar. during the season 1888-89 was 51, or one more than the previous year; the number had been steadily on the decline since 1883-84, when there were 85 at work. The "Annuaire" says that there was not only a considerable increase in the quantity of sugar produced, based on the amount of beetroot treated, but also in the percentage of sugar obtained from the roots.

These increases are attributed to the larger extent of ground planted, to a heavy crop, to the saccharine richness of the beet, and in a certain degree to the improvements introduced in the method of extracting the sugar. Unfortunately, no statistics are given.

The number of distilleries at work in 1888-89 was 47 against Spirits. 44 in the previous year, and the produce 5,476,594 gallons, or an increase of 1,460,891 gallons over the previous year; but this only brings up the produce to a couple of hundred gallons more than in 1886-87.

The manufacture of spirits was favourably affected like the sugar industry by the abundance and richness of the beet crop.

The recently-published "Annuaire of the Pas-de-Calais" Beer. says, that in 1888 the quantity of beer brewed declined throughout the department. This it attributes to two causes, firstly, the generally straitened circumstances of the industrial and agricultural population, and, secondly, the contributory one of the abundance and cheapness of cider caused by the exceptional apple crop of 1887.

The effects of the first of these causes has been diminishing for some time past, owing to the steady revival of trade and business, thus at present most of the breweries are more actively employed, and there seems nothing at present to check a steadily-increasing production, except it be clandestine home brewing, which tends to assume larger proportions.

The number of breweries in 1888 was 604, or 13 more than in 1887, when there was an increase of 63 over the previous year; and the quantity of beer brewed in 1888 was 24,077,773 gallons (12,284,595 strong, and 11,793,178 light), which shows an appreciable decrease as compared with 1887, when the total quantity was 25,762,550 gallons; the decrease was about the same in each quality. The figures for the first six months of 1889 show an increase of 241,427 gallons, as compared with the corresponding period in 1888.

All the deposits of iron ore in the department of the Pas-de-Calais, which number about 30, are situated in the Boulogne district. Of these, four belonging to the Société de Montataire were worked in 1887, the ore being used at their furnaces at Outreau; but the last of these having now been blown, no ore was extracted in 1888.

A certain quantity of old railway iron has been imported from

England for use at the works at Marquise. These works are large, but little work is now done there. Iron pipes seem to be the chief article they produce. These, as also some lamp-posts, have been sent to Portugal and Holland.

The following table gives the usual summary of the production of the iron works of the Nord in 1888, as compared with the previous year :—

	1888.		1887.		1882.
	Quantity in Tons of 1,000 Kilos.	Price, Ex- change 25 fr. to the £.	Quantity in Tons of 1,000 Kilos.	Price, Ex- change 25 fr. to the £.	Price, Ex- change 25 fr. to the £.
	Tons.	£ s. d.	Tons.	£ s. d.	£ s. d.
Refined iron	231,682	1 15 3	223,315	1 15 5	3 0 0
Merchant and special	255,634	5 0 11	244,222	5 2 5	7 8 0
Rails	114	5 11 7	99	5 14 0	7 16 0
Sheet iron	47,129	6 5 7	44,253	6 0 0	10 16 0
Bessemer steel	91,687	5 1 0	89,229	5 0 9	7 13 7

Zinc.

An examination of this table shows little variation in prices in 1888, but a small increase in quantity over the previous year.

The works at D'Auby-lez-Douai produced 11,210 tons of zinc in 1888, which were sold at an average price of 16*l.* 18*s.* 3*d.*, against 14*l.* 10*s.* 3*d.* in the previous year (when the produce was 2 tons more), and 14*l.* 1*s.* 11*d.* in 1886, so the price shows a steady rise.

Coal.

The quantity of coal raised in the coal basins of the Nord and Pas-de-Calais shows a further increase in spite of the strikes of last autumn. In my last report I gave figures for 10 years, and showed how the output had steadily increased since 1879, except during the years 1884–85, when there was a temporary and very slight decrease. It will be seen that whilst the output in the Pas-de-Calais last year is more than double what it was in 1879, that of the Nord has only increased by about 50 per cent. during the same period.

Year.	Pas-de-Calais.	Nord.
1879	4,175,573	3,273,514
1888	7,877,214	4,499,220
1889*	8,624,837	4,809,010

* Approximate.

Pas-de-Calais.—There are two distinct coal basins in this department, the one which extends from Douai to Bethune, covering an area of about 143,000 acres, is the coal basin of the Pas-de-Calais, and is the only one worked; the other is that of Boulonnais, which has not been worked latterly.

The following table gives details as to number of hands employed, accidents, wages, &c., in 1887 and 1888. It will be

noticed more men and women, but less children, were employed in the latter year.

		1887.	1888.
Employed under ground—			
Men	Number ..	19,511	20,896
Children	” ..	2,614	2,506
Average daily wages ..	Francs ..	3·89*	3·91*
Days worked under ground..	Number ..	6,489,170	6,880,961
Employed above ground—			
Men	Number ..	5,461	6,040
Women	” ..	643	731
Children	” ..	931	895
Average daily wages ..	Francs ..	2·91†	3·03‡
Days worked above ground..	Number ..	2,255,213	2,382,653
Accidents	” ..	102	104
Persons killed	” ..	22	37
” injured.. .. .	” ..	87	71
Total wages paid	£ sterling..	1,275,220	1,365,625
” coal raised	Tons ..	7,119,633	7,877,213
” stock on 31 December ..	” ..	154,626	68,407

* 3s. 1d.

† 2s. 4d.

‡ 2s. 5d.

The coal raised in the Pas-de Calais in 1888 was disposed of as follows:—

				Tons.
Stock from 1887	..	..	..	154,576
Extracted 1888	..	..	..	7,877,213
Total available				8,031,789
				Tons.
Used at the mines	..	..	..	533,657
Sold for use in Pas-de-Calais ..	..	..	..	1,309,143
” ” the Nord	..	..	..	2,228,872
” ” other parts of France ..	..	..	..	3,732,863
” ” abroad	..	..	..	158,847
Stock on 31 December, 1888 ..	..	..	..	68,407
Total				8,031,789

Nord.—I have already stated that the quantity of coal raised steadily increases, and I have given the figures.

The following table gives the number of persons employed, wages paid, &c.:—

		1887.	1888.
Hands employed under ground ..	Number ..	13,690	13,621
” ” above ”	” ..	3,540	3,935
Wages paid	£ sterling ..	732,968	749,255
Coal raised	Tons ..	4,197,795	4,416,185
Deaths through accidents	Number ..	12	15

The quantity of coal from the different collieries consumed in the Department of the Nord is estimated to have been as follows:—

				1887.	1888.
				Tons.	Tons.
From mines in the Department of the Nord..	..			2,034,819	2,089,286
"	"	Pas-de-Calais	..	1,959,219	2,024,627
"	"	Belgium	.. ..	1,051,327	1,081,100
"	"	Great Britain	.. ..	3,247	5,812
"	"	Germany	.. ..	2,565	2,545
Total	..	..	..	5,050,877	5,153,370

Quarries.

In the Department of the Pas-de-Calais there are about 80 underground quarries, which are employing on an average 285 workmen, and 430 open ones, employing about 2,600.

The phosphate quarries maintained in 1888 the importance they had acquired in 1887. The basin of the Boulonnais contains 74 quarries in work, of which 35 are underground, employing 282 workmen. The basin of Pernes counts 48 open quarries, giving employment to 183 workmen, and two underground ones, employing 18; and finally the deposits of Orville included, at the end of 1888, 19 open quarries, employing 410 workmen, and 2 underground ones, employing 5 workmen. About 95,000 tons of phosphates were extracted from these quarries.

Portland cement.

The Portland cement manufactories are stated to have done a very good trade during the past year, the fact of the weight exported having fallen does not mean depression, as the home market is the most important. For all Government works foreign cement is not accepted, and for these they have had some large orders, so that the trade is prospering.

In a statement to the Chamber of Commerce, I find a desire expressed for a protective duty, and the statement that the cost of manufacture renders competition abroad very difficult, as prices rule so low there; however, according to the custom-house returns, 23,472 tons were exported last year from this port, less went to Cochin China than in previous years, which may account for some of the decrease, and leave the quantity sent to foreign countries much the same. The principal customers are Portugal, Spain, and Holland; as I have said before, surely our manufacturers ought to be able to compete in those countries.

Pen making.

There are some large steel pen and pencil manufactories in this town, giving employment to a considerable number of hands, they export more or less to all parts of the world, but principally to Belgium, Russia, the Levant, Spain, Portugal, and South America; they export direct or through Paris houses, but some steel pens are, nevertheless, imported from England, and pencils from Germany and Austria.

The cast steel for the manufacture of the pens requires to be of a special quality, and is all obtained from Sheffield.

At the beginning of last year there was, as I then stated in my ^{Lace trade.} report, a slight improvement in the lace trade at Calais, there seemed reason to hope this would continue and be but the commencement of a return to more prosperous times after the severe depression from which this important industry has suffered, but unfortunately the hope has proved delusive, and it is with regret I have now to record that, from all I hear, this industry appears to be in a worse state than for many years past.

The wool trade in the Department of the Nord is very important, ^{Wool trade.} and I think the following translated extract of an article regarding it, which appeared in the "Journal de Roubaix," may prove of interest.

I should state that "jardinière" threads are so called from a somewhat fanciful resemblance in colour to "potage à la jardinière." The invention is recent and has not yet been introduced into England. Chevrons, Ramie, Mordantées, are the French names of Roubaix specialities, and have no equivalent English term. Foreign buyers use the Roubaix designations. The same remark applies to the kind of stuff known as "vigorous."

ROUBAIX, TOURCOING.

The study of the movements of wool through our public ^{Testing-} testing-houses in 1889 is not without interest. It is noteworthy ^{houses.} that the quantity of top tested, shows a marked increase over that of 1888. In fact, there passed through the Roubaix testing-house, in 1889, 25,661,828 kilos., against 22,156,150 kilos. in 1888—that is, an increase of 3,505,318 kilos., or 15·8 per cent. At Tourcoing, the quantities are stated at 18,969,443 kilos. in 1889, and 17,747,605 kilos. in 1888, an increase of 1,251,838 kilos., or 7·05 per cent. The united figures for the two towns are 44,661,271 kilos. in 1889, as against 39,904,115 kilos. in 1888—that is, 4,757,156 kilos., or 11·9 per cent. in favour of 1889.

The increase in the amount of spun wool for 1889 is equally marked. The Roubaix testing-house received, in 1888, the quantity of 4,144,494 kilos. of spun wool; in 1889 this quantity reached to 5,260,287 kilos., an increase of 1,115,793 kilos., or 26·3 per cent. At Tourcoing, from 2,716,844 kilos. in 1888, the quantity tested rose to 3,149,515 kilos. in 1889, an increase of 432,671 kilos., or nearly 16 per cent.

For the two towns the quantity of spun wool tested was 8,409,802 kilos. in 1889, and 6,861,338 kilos. in 1888—that is to say, an increase of 1,548,464 kilos., or 22½ per cent.

The year 1889 has been a very favourable one to business in ^{Noils.} noils; and owing to a regular and sustained demand by consumers, business, especially in fine noils, has been almost uninterruptedly active. There have been, however, certain fluctuations in prices. Thus, prices rose until April; then they fell, and remained stationary for four months, only to rise again in October, and to maintain the rise up to the end of the year, when a decline, scarcely

sensible, it is true, made itself felt. The following table will show the various fluctuations. We have taken as standards, good and second quality, both in Australian and Buenos Ayres, and we give the average prices for each month.

Month.	Australian (Superior).		Australian (Ordinary).		Buenos Ayres (Superior).		Buenos Ayres (Ordinary).	
	Fr.	c.	Fr.	c.	Fr.	c.	Fr.	c.
January	3	70	3	50	3	40	3	25
February	3	90	3	60	3	50	3	30
March	4	00	3	75	3	60	3	40
April	4	10	3	75	3	70	3	50
May	4	05	3	75	3	75	3	45
June	3	95	3	65	3	65	3	45
July	3	95	3	65	3	65	3	45
August	3	95	3	65	3	65	3	45
September	3	95	3	65	3	65	3	45
October	4	05	3	70	3	70	3	50
November	4	15	3	85	3	85	3	55
December	4	05	3	75	3	75	3	45

Waste.

Much business was done in certain kinds of waste destined for export to America, and, speaking generally, it may be said that waste wools followed the course of the other branches of the woollen trade, and profited by their good condition.

At the time of the first series of public sales in February, spinner's merino waste, weft waste, and warp waste, obtained the closing prices of the preceding sales, but other qualities fell from 8 per cent. to 10 per cent.

In May, certain qualities of weft waste attracted the attention of buyers who paid the full prices of the last sales, if not more; but best quality spinners' waste and common wool waste were in no demand.

In August the following prices obtained:—Best quality spinners' merino waste, undyed, from 5 fr. to 5 fr. 40 cents.; dyed, from 4 fr. 20 cents. to 4 fr. 50 cents.; spinners' long wool waste, undyed, from 2 fr. 70 cents. to 2 fr. 80 cents.; dyed, from 2 fr. 30 cents. to 2 fr. 60 cents.; merino weft waste, undyed, from 4 fr. 15 cents. to 4 fr. 60 cents.; the same, dyed, from 2 fr. 90 cents. to 3 fr. 10 cents.; wool, weft waste, from 2 fr. to 2 fr. 45 cents.; dyed, from 1 fr. 15 cents. to 1 fr. 45 cents.

The October sales showed about the same rate of prices as in the table above.

Finally, the last auctions in December were signalised by brisk sales of wool at the following rates (average):—Spinners' merino thread waste, undyed, from 5 fr. 15 cents. to 5 fr. 50 cents.; dyed, from 4 fr. 60 cents. to 4 fr. 65 cents.; undyed merino weft waste, from 4 fr. 35 cents. to 4 fr. 70 cents.; spinners' merino thread waste, dyed, from 3 fr. 05 cents. to 3 fr. 45 cents.

State of trade.

Combing and spinning have done well in 1889. The latter industry has greatly improved; the requirements of consumers on the one hand, and, on the other, the understanding arrived at

between the spinners in consequence of the formation of the Union, have contributed to raise the price of manufacture. The dyeing and dressing trades have also done well; hosiery alone has been excepted from the general prosperity. This branch of our textile industry has suffered for some time past from causes too long to enumerate; but the principal of which has been a badly managed competition, a crisis which deprives it of the just reward of its labour.

The only remedy for the present position is an understanding between all interested; the basis of a syndicate has been recently formulated, and there is reason to believe that one will shortly be formed.

The year 1889 has certainly been a good one for the manufacture of the goods of our markets, and has brought a sensible increase in the export business; these are the two great points worthy of note; but it will not be amiss to pass the principal articles of local manufacture, successively in review.

The winter season began in January and February. Large orders were sent at this time from England and America, principally of twills and figures, and especially of milled articles in the way of amazones. Paris and the provinces also ordered as usual; but these orders did not attain the importance of those for exportation.

From the beginning of the season, cheap milled goods, warp, cotton weft, carded wool, yarn dyed goods, and beiges, or piece-dyed, on grey carded wool, have also been much in demand.

A most successful innovation was the introduction of the jardinière thread. These fast-dyed cotton threads, owing to a new process, do not change colour when the wool is dyed in the piece. By this improvement, shade effects are enabled to be multiplied and varied almost indefinitely.

These cheap milled goods, however, did not meet towards the close of the season with the usual demand for them; and this want of success may be attributed to various causes, of which we will speak later on, and also to the taste of provincial buyers, which was fixed on other articles, and amongst them printed meltons, as yet not manufactured at Roubaix.

As regards winter fancies, they have principally consisted of blue and green checks, of borders for bottoms of skirts, produced by rich jacquart effects, of embroidered dresses in the way of soutaches, and of flaked stripes and checks. Plain beiges have been in demand as usual.

From the beginning of the summer season, the English and Americans bought a large part of the total production; and this fact is one of the reasons for the rise in prices noted in October. French buyers showed less push; nevertheless, orders were sent in early, so as to insure delivery.

In fancies, flakes on vigorous, and on piece-dyed goods, as well as shaded stuffs, were much in request. There was also manufactured a large quantity of silk stripes in cream and other summer shades.

Cloth and
ready-made
clothing.

Backed woollens and beavered mantle cloths for ladies' jackets and mantles always sell well. Diagonals, chevrons, long diagonals requiring a considerable quantity of threads, as well as jacquart twills, have been, and are still, in demand.

Corkscrew grounds have had their accustomed success, and for summer goods these grounds have been worked out as well in woollen goods, as in cloth for men's wear.

Mohair stripes, undemanded at the beginning of the winter season, are again become fashionable. Many attempts have been made to replace them by Devonshire wools, and even by ramie, but the mohair has always commanded the best sale.

Many kinds of woollens were also manufactured in the winter season in jacquart designs, both wool and mohair; the same articles have also been worked out in fancies—mordantées. Finally, plain cheviots have been one of the greatest successes of the season.

The cloth for men's wear made at Roubaix and Tourcoing is really improving in quality, and is much in vogue, especially in cheap and moderate priced goods. The cheap cloths tend to take the place of English articles and drapery from the South of France, for ready-made goods; our articles look quite as good, and while being more strongly made, are at the same time cheaper.

In ending this review, we are bound to acknowledge the vigorous initiative and creative genius which distinguish the manufacture of the stuffs of our markets; it is those great qualities that have made its success, and that assure for it in the future an indisputable and undisputed sovereignty.

PUBLIC WORKS.

Boulogne
harbour.

In my yearly report published in 1888, I gave, in great detail, the particulars of a scheme for deepening the interior of the existing tidal harbour, so as to obtain a minimum of 12 feet at low water spring tides. I reported last year that the scheme, having been definitely approved and sanctioned, work would soon begin; some dredging has been carried on inside the harbour as well as out, but I do not think much has been done; however, now a hoarding has been erected on the west quay and the work of building a stone quay wall, about seven metres in advance of the present one, has been seriously taken in hand; as I reported, this will have to be done on both sides of the harbour, since it is considered that it would be dangerous to dredge close up to the existing quays, as their foundations are not carried deep enough; the construction of the new quay walls will decrease the width of the harbour, but their foundations will be carried much deeper and render it possible to dredge close to them, therefore they must be built before the projected deepening of the harbour can be completely realised, but I understand that a more powerful dredger is to be obtained, and the work of deepening carried on much more actively than hitherto.

On June 4 M. Carnot, the President of the Republic, came to Boulogne, after having opened the new works at Calais on the

previous day; he visited the harbour and was taken out to officially inaugurate the completion of the south-west breakwater, which is to be known hereafter as the "Digue Carnot"; this breakwater, as I have before stated, affords considerable protection to the entrance of the tidal harbour, and its erection has had the effect of altering the set of the current across the pier heads; formerly with the flood there was a very strong current to the eastward, this now passes outside the breakwater and the current at the pier heads sets to the westward, or in the same direction as with the ebb.

In my report last year I stated that the new harbour works at Calais Calais were fast approaching completion, I have now to record Calais harbour. that they were formally declared open, amidst great rejoicing, by M. Carnot, the President of the Republic, on June 3. Although the floating dock was completed, the embankment, which had divided the new from the old tidal harbour, was not sufficiently removed to enable the latter to be regularly used by the mail and passenger steamers; however, this being accomplished, they commenced using the quay specially constructed for their use on October 21, when the new maritime and central stations were also opened for regular traffic. The accommodation now afforded for landing and embarking mails and passengers is greatly improved, but the apparatus for the electric lighting of the station and passenger quay is not yet completed.

The old Calais town and maritime stations, as well as that of St. Pierre, have been closed; the two latter are being removed, and the former will probably be retained as a goods station for the use of the steamers using the old tidal harbour. To give an idea of the importance evidently attached to the future traffic of the port by the Northern of France Railway Company, I should mention that on their new stations, sheds, sidings, &c., they have spent, or rather estimate they will spend before they are completed, a sum of 8,000,000 fr., or 320,000*l*.

As I have said the floating dock is completed, as are also the warehouses, hydraulic cranes, apparatus for lighting with electricity, lines of rails, &c.; all that is wanting now are ships to fill it, these have not yet arrived. So far, it has only afforded accommodation to the few vessels which formerly used the old floating dock; this latter will continue to be used for vessels with petroleum, as also for small vessels. The dry dock is not yet ready for use, the caissons and pumping machinery not being completed. Quays have been levelled, roads made, bridges built over the new canals and lines of rail, indeed, an immense amount of work has been done, and very thoroughly too, but there are many things still to be completed; for instance, the entrance from the old tidal harbour has to be rounded off, and the old and new quays united.

There can be no question as to the facilities afforded inside the port, but the same cannot unfortunately be said of the approach—there is plenty of water for large vessels to enter for at least two hours before and two hours after high water; but in spite of the dredging which is carried on outside, a continuance of north-east winds always brings up sand, which begins to form a bar if the

weather is too bad for the dredgers to work for some days; this is an inconvenience, and it is much to be desired that something should be done, and at once, to render the approach to the harbour worthy of the accommodation afforded inside; the matter, I understand, is under consideration, and it could, it is believed, be effectually accomplished by building a short breakwater to the eastward.

Channel
passenger
service.

GENERAL REMARKS.

It is only natural that there should have been an increase in the passenger traffic at Boulogne and Calais last year on account of the Paris Exhibition.

The following table gives the number of passengers, at each port, for each of the last five years as well as for 1878, the year of the former Paris Exhibition.

Year.	Boulogne.	Calais.
1878	144,888	260,603
1885	118,096	190,595
1886	146,546	215,879
1887	128,148	235,695
1888	120,021	248,001
1889	127,430	346,934

The following tables give the usual details showing how these figures are made up during the past year:—

BOULOGNE in 1889.

Description of Steamers.	Landed.	Embarked.	Total.
South-Eastern Railway Company from Folke- stone	52,067	57,956	110,023
General Steam Navigation Company from London	5,555	5,232	10,787
Various (excursionists) ..	2,103	1,936	4,039
American line	799	1,782	2,581
Total	60,524	66,906	127,430

CALAIS in 1889.

Description of Steamers.	Landed	Embarked.	Total.
English or night mail ..	43,975	46,421	90,396
French mail or first day service	35,501	43,410	78,911
Second day service	71,418	66,275	137,693
Club train, specials, and excursionists	24,605	15,180	39,785
London	78	71	149
Total	175,577	171,357	346,934

The above figures show how Calais is monopolizing the passenger traffic between this country and England; there was an increase of only 7,409 at Boulogne last year, which includes 2,581 passengers of the Dutch-American line, and shows a decrease of 17,408 when compared with 1878, the year of the former Paris exhibition; whereas at Calais the increase over the previous year was 98,933, and the number is greater by 86,331 than in 1878, which had hitherto been the best year on record.

The twin-steamer "Calais-Douvres" was not put on to the Calais line again last summer, but her place was taken by a new vessel of the same name, she is of the same type as the last three new ships of the London Chatham and Dover Railway Company, but slightly larger.

In addition to the three daily services between London and Paris, viâ Dover and Calais, a new one, called the "club train," was started last summer; for this service, which does not run from London on Sundays, or Paris on Saturdays, the train between Calais and Paris consists entirely of saloon carriages. The facilities for travellers by other trains, owing to the arrangements for through carriages and sleeping cars between Calais and various parts of Europe, have been greatly increased.

I have just obtained the figures for the passenger traffic during the first three months of this year, and have below compared them with those of the three previous years; the decrease at Boulogne is continuous, and at Calais the increase is most marked, in one month only of the period under review has there been a decline.

	1887.	1888.	1889.	1890.
Boulogne—				
January	5,347	4,629	4,348	3,273
February	4,849	4,134	3,831	3,663
March	6,469	6,306	5,152	4,933
1st Quarter	16,665	15,069	13,331	11,869
Calais—				
January	13,051	13,801	14,822	14,355
February	11,972	12,555	13,277	14,314
March	13,773	15,511	16,409	17,198
1st Quarter	38,796	41,867	44,508	45,867

By decrees of May last, whilst the tax on each passenger landing or embarking at Boulogne or Calais was maintained at 1 fr. 75 c. (about 1s. 5*d*), a special reduction of one-half was granted, during the time of the exhibition, in the case of holders of return-tickets, available for not more than fourteen days, and the tax was permanently reduced to 1 fr. (about 10*d*.) in the case of day excursionists by special steamers.

By a further decree of July last the tax on emigrants, at Boulogne, was reduced to 50 c. (about 5*d*.), this is specially for the benefit of the third class passengers by the Dutch-American steamers.

Annex No. 1.—RETURN showing the Principal Imports at the Port of Boulogne, during the Years 1888 and 1889, of Goods paying Duty.

Description of Goods.	Weights or Measures.	1888.	1889.
Waste silk, spun	Tons ..	21	7
Sea-fish, other than cod	" ..	1,325	971
Mother-of-pearl, a natural shell	" ..	1,026	989
Wheat	" ..	92	69
Sugar	" ..	5½	5
Preserves and sweet biscuits	" ..	119	135
Coffee	" ..	12½	220
Tea	" ..	30	31
Fixed oils, pure and others	" ..	196	6½
Coal	" ..	118,818	98,740
Pig-iron	" ..	5,579	103
Iron of all kinds	" ..	40	82
Steel, in bars	" ..	380	370
" rolled in plates	" ..	44	4
Beer	Gallons ..	29,193	31,162
Yarns of (fils de)—			
Flax or hemp	Tons ..	57	67
Cotton, pure or mixed, by weight	" ..	629	636
" " " by measure	1,000 metres or 1,094 yards	7,001,915	6,493,538
Alpaca wool, pure or mixed	Tons ..	..	368
Goats'-hair	" ..	353	338
Tissues of wool—			
Carpets	" ..	303	302
Other tissues	" ..	3,192	2,988
Tissues of cotton—			
Tulles (lace)	" ..	5½	7½
Other tissues	" ..	1,363	1,076
Machines and machinery	" ..	1,085	1,332
Articles in iron or wire	" ..	747	721
Petroleum	" ..	..	811

GOODS Exempt from Customs Duties.

Description of Goods.		1888.	1889.
Wool of all kinds	Tons ..	10,843	11,260
Silk, raw or thrown	" ..	175	..
Cereals, other than wheat	" ..	2,667	1,171
Wood for building	" ..	37,609	19,480
Jute	" ..	4,453	11,302
Manilla hemp	" ..	174	217
Ice	" ..	3,217	3,274
Iron ore	" ..	45,071	..
Total weight of imports	" ..	274,231*	199,971

£

Total value of imports in 1888 6,582,571
 " " " in 1887 6,268,072

* The weight of the Commerce Général is given as 248,259 in the "Tableau Général," published in Paris.

Annex No. 2.—RETURN showing the Principal Articles of Import
at the Port of Calais, during the Years 1888 and 1889, of
Goods paying Duty.

Description of Goods.	Weights or Measures.	1888.	1889.
Raw wool	Tons ..	805	856
Waste silk, spun	" ..	126	174
Silk, raw or thrown	" ..	26	48
Sea-fish, other than cod	" ..	9	6
Cereals, wheat, &c.	" ..	2,107	849
Oils, fine, pure	" ..	15	9½
Cotton, raw	" ..	8½	36
Coals	" ..	74,090	55,160
Pig-iron	" ..	18,465	17,969
Iron of all kinds	" ..	537	313
Steel—			
Bars of all kinds	" ..	19	15
Rolled in plates or wire	" ..	19	35
Beer	Gallons ..	41,381	45,271
Yarns of—			
Flax	Tons ..	12½	10
Cotton, by weight	" ..	343	190
" by measure	1,000 metres, or 1,094 yds.	334,241	210,332
Wool	Tons ..	32½	19
Goats'-hair	" ..	53½	80½
Tissues of cotton—			
Tulles	Lbs. ..	4,263	1,199
Other tissues	Tons ..	366	209
Tissues of wool—			
Carpets	Cwts. ..	41	39
Other tissues	Tons ..	23	13
Salt pork and lard	" ..	138	188
Machines and machinery, in pieces	" ..	689	1,214
Articles in iron	" ..	55	81
" wood	" ..	277	44
Petroleum	" ..	13,515	1,640

Goods Exempt from Customs Duties.

Description of Goods.		1888.	1889.
Raw wool	Tons ..	19,264	15,305
Silk, raw or thrown	" ..	77	119
Wood for building—			
Unhewn, squared	" ..	833	273
Sawn	" ..	73,635	65,473
Jute	" ..	4,574	3,880
Yeast	" ..	311	155
Ice	" ..	2,926	2,945
Vegetable fibres	" ..	702	546
Total weight of imports	" ..	224,637	170,414

£

Total value of imports in 1888	3,554,508
" " " in 1887	3,853,653

Annex No. 3.—RETURN showing the Principal Exports at the Port of Boulogne during the Years 1888–89.

Description of Goods.	Weights or Measures.	1888.	1889.
Portland cement	Tons ..	36,873	23,473
Eggs	" ..	1,030	1,051
Herrings, dried, salted, or smoked ..	" ..	1,131	856
Fresh sea fish	" ..	1,198	353
Potatoes.	" ..	1,810	399
Dried vegetables	" ..	3 $\frac{1}{2}$	15
Fresh fruits of all kinds	" ..	5,136	4,089
Seeds for sowing	" ..	136	135
Rags	" ..	1,827	1,465
Wine and liqueurs	Gallons ..	1,609,065	1,182,555
Brandy and other spirits	" ..	13,237	14,185
Pottery and porcelain	Tons ..	759	867
Glass, bottles, &c.	" ..	8,313	6,876
Tissues of—			
Silk (tulles)	Lbs. ..	4,974	4,464
" others	Tons ..	637	827
Linen or hemp	" ..	16	8
Wool	" ..	6,610	7,535
Cotton (tulles)	" ..	1	1 $\frac{1}{2}$
" others	" ..	367	477
Silk in cocoons, raw or thrown	" ..	93	58
" of all kinds	" ..	367	206
Paper	" ..	386	352
Prepared skins	" ..	1,044	856
Articles in skin or leather	" ..	233	158
Works in metal—			
Cast iron	" ..	3,809	5,970
Copper, pure or alloyed	" ..	63	85
Other than abovenamed	" ..	282	262
Articles in india-rubber (caoutchouc) ..	" ..	40	43
Haberdashery and fancy articles	" ..	809	813
Gold coin	Oz., Troy ..	..	136
Silver	" ..	20,064	13,872
Total weight of exports ..	Tons ..	126,410*	114,411

£			
Total value of exports in 1888	..	..	9,244,754
" " in 1887	..	..	7,825,229

* The weight of the Commerce Général is given as 114,298 in the "Tableau Général" published in Paris.

Annex No. IV.—RETURN showing the Principal Articles of
Export from the Port of Calais during the Years 1888–89.

Description of Goods.	Weights or Measures.	1888.	1889.
Poultry, live	Tons ..	32	37
„ dead	„ ..	116	115
Dead meat	„ ..	401	491
Raw wool	„ ..	107	440
Silk in cocoons, raw or thrown	„ ..	44	10
„ of all kinds	„ ..	15	10
Eggs	„ ..	634	854
Dried yeast	„ ..	2,127	1,018
Cereals, grain and flour	„ ..	5½	7
Potatoes	„ ..	18½	8
Vegetables, dry	„ ..	2	9
Fruit of all kinds	„ ..	436	596
Forage, hay, and straw	„ ..	8,603	11,647
Seeds for sowing	„ ..	50	113
Sugar, French raw	„ ..	619	1,598
„ refined	„ ..	403	785
Osiers, in bundles	„ ..	250	309
Fresh vegetables	„ ..	977	625
Cut flowers	„ ..	82	94
Rags	„ ..	453	486
Wines and liqueurs	Gallons ..	539,337	499,674
Brandy and other spirits	„ ..	1,401	1,919
Pottery and porcelain	Tons ..	36	78
Glass bottles, &c.	„ ..	3,064	4,441
Cotton yarns	Cwt. ..	12	220
Woollen yarns	Tons ..	376	1,291
Tissues of linen or hemp	„ ..	5	4
„ cotton, tulle	„ ..	2	3½
„ „ other kinds	„ ..	27	129
„ wool	„ ..	1,871	1,957
„ silk, or waste silk tulle	„ ..	33	46
„ „ other kinds	„ ..	380	161
Paper	„ ..	33	19
Prepared skins	„ ..	27	120
Works in metal—			
Cast iron	„ ..	3	14
Copper, pure or alloyed	„ ..	4½	2
Other than above	„ ..	21½	64
Machines, other than steam	„ ..	108	388
Basket work	„ ..	273	239
Articles in skin or leather	„ ..	53	29
Haberdashery and fancy articles	„ ..	8½	2
Phosphates	„ ..	981	..
Total weight of exports	„ ..	39,645	48,805

£

Total value of exports in 1888	3,434,030
„ „ in 1887	4,079,649

Annex No. V.—RETURN of all Shipping at the Port of Boulogne
in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	42	9,847	1,366	358,588	1,408	368,435
French* ...	44	5,646	4	1,800	48	7,446
Norwegian ...	48	12,237	4	1,343	52	13,640
Swedish ...	3	1,107	3	1,065	6	2,172
Belgian ...	...	...	1	680	1	680
German ...	...	...	2	729	2	729
Dutch ...	4	217	56	130,835	60	131,052
Russian ...	7	2,493	...	...	7	2,493
Austrian ...	1	358	...	...	1	358
Danish ...	8	509	...	...	8	509
Total ...	152	32,474	1,436	495,040	1,588	527,514
French coasting ...	574	36,833	97	41,024	671	77,857
Total ...	726	69,307	1,533	536,064	2,259	605,371
„ for 1888 ...	787	76,321	1,423	448,286	2,210	524,997

* Exclusive of 14 ships, 882 tons, engaged in Iceland, &c., codfishery, against 33 ships, measuring 2,184 tons, so engaged in 1888.

Annex No. VI.—RETURN of all Shipping at the Port of Boulogne
in the Year 1889.

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	47	9,626	1,368	360,506	1,415	370,132
French* ...	27	8,567	6	3,502	33	12,069
Norwegian ...	48	12,457	6	1,753	54	14,210
Swedish ...	5	1,492	1	356	6	1,847
Danish ...	4	649	...	...	4	649
Dutch ...	3	138	56	131,001	59	131,139
Belgian ...	...	...	1	680	1	680
German ...	...	...	2	748	2	748
Total ...	134	32,929	1,440	498,545	1,574	531,474
French coasting ...	631	58,720	93	40,130	724	98,850
Total ...	765	91,649	1,533	538,675	2,298	630,324
„ for 1888 ...	800	78,706	1,426	454,078	2,226	532,784

* Exclusive of 14 ships, 882 tons, engaged in Iceland, &c., codfishery.

Annex No. VII.—RETURN of all Shipping at the Port of Calais
the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	15	282	1,572	286,642	1,587	286,924
French	17	3,033	502	152,428	519	155,461
Norwegian	40	12,259	1	408	41	12,667
Russian	26	9,541	1	153	27	9,694
Swedish	9	2,222	3	1,426	12	3,648
German	1	288	2	807	3	1,095
Danish	3	559	..	...	3	559
Belgian	5	197	...	...	5	197
Total	116	28,381	2,081	441,864	2,197	470,245
Total for 1888	187	47,115	1,915	442,982	2,102	480,097
Coasting „	...	...	...	...	109	7,762

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FRANCE.

REPORT FOR THE YEAR 1889
ON THE
TRADE OF MARSEILLES.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 510.

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621. Kiukiang	½d.	684. Port Said	1d.
622. Paris	1d.	685. Coquimbo	½d.
623. Salonica	1½d.	686. Warsaw	1d.
624. Réunion	1d.	687. Ichang	1d.
625. Ichang	1d.	688. Wenchow	1d.
626. Bogotá	1d.	689. Trebizond	1d.
627. Malaga	2d.	690. Damascus	½d.
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630. The Hague	½d.	693. Santos	1d.
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FRANCE.

MARSEILLES.

Consul Perceval to the Marquis of Salisbury.

My Lord, *Marseilles, March 24, 1890.*

I HAVE the honour to enclose herewith my Commercial Report for the year 1889, including one from Mr. Ottley, Vice-Consul at Lyons.

I have, &c.

(Signed) CHARLES G. G. PERCEVAL.

Report on the Trade and Commerce at Marseilles for the Year 1889.

SHIPPING AND NAVIGATION.

The annexed return of shipping at this port shows, as compared with the figures for the year 1888, an increase of 226 vessels and a decrease of 126,838 tons.

The numbers and tonnage of vessels under the British flag trading to Marseilles, during the year 1889, show a diminution of 84 vessels and of 67,707 tons, which falling-off may be accounted for by the smaller amount of coal imported from the United Kingdom during the year, and also by a decline in the quantity of wheat received, as mentioned further on in this report.

The amount of coal carried by British vessels during the 12 months under review was 212,046 tons, against 237,784 tons in 1888. As usual the greater part of our steam colliers sailed hence in ballast for the Black Sea, Spanish, or Algerian ports, seeking freight. Coals from the United Kingdom in British bottoms.

An increase has taken place in the number of French vessels amounting to 357, whilst the tonnage has declined by 29,582 tons as compared with the figures for the preceding year, and this falling-off has been in steam tonnage. French shipping.

Very little change is observable in the amount of Italian shipping and tonnage, whilst a falling-off of 35 ships and 75,231 tons has taken place in vessels under the Dutch flag; this is to be attributed to one of their steam shipping companies having adopted Genoa as their port of call instead of Marseilles. Italian shipping. Dutch shipping.

Spanish
shipping.

The number and tonnage of Spanish vessels have increased by 54 and 74,736 tons, this augmentation being in steamers, their sailing vessels showing a decline as compared with 1888.

Greek
shipping.

Vessels under the Greek flag have fallen off by 20 vessels and 11,447 tons.

German
shipping.
Swedish and
Norwegian
shipping.

The numbers and tonnage of German ships are in excess of the amount in the previous year by 11 vessels and 15,834 tons.

Swedish and Norwegian vessels show a decline of 31 vessels and 17,403 tons.

Shipping of
other
nationalities.

A general falling-off in tonnage is observable in the shipping of other nationalities during the year, as compared with the traffic during 1888.

Passengers by
sea.

The number of passengers arriving at Marseilles by sea, exclusive of military and prisoners, was :—

1889	..	..	..	..	..	..	101,884
1888	..	..	..	..	..	..	89,653
Difference	..	..	..	..	..	..	12,231

The number of passengers leaving Marseilles by sea was as follows :—

1889	..	..	..	..	..	..	91,457
1888	..	..	..	..	..	..	72,274
Difference	..	..	..	..	..	..	19,183

igrants.

The number of emigrants embarked at Marseilles during the year 1889 was 22,594, composed of 1,660 French and 20,934 foreigners.

INDUSTRIES, TRADE AND COMMERCE.

Imports.

The total imports for the year 1889 have amounted to 2,354,412 tons, against 2,493,437 tons in the previous year.

Wheat.

The wheat crops in France have been about 25 per cent. larger than in 1888-89, consequently imports of foreign wheat show a diminution, 555,378 tons against 749,821 tons in 1888, and 558,654 tons in 1887. In the southern provinces in particular the yield has proved a fair average one, so that the districts surrounding Marseilles have not had much recourse to foreign produce. In the neighbourhood of Lyons and Dijon (which districts are generally supplied from Hungary) the requirements have been covered from Marseilles, owing to small crops in Austro-Hungary, and for the same reason Switzerland has been to a large extent tributary to Marseilles, having even at different times caused an upward movement in prices by large purchases here. Below are particulars of imports of wheat :—

Countries.	1889.	1888.
	Tons.	Tons.
Russia	293,369	459,258
Turkey (Asia Minor)	98,262	123,688
Danube	51,656	32,575
East India	37,417	80,892
Algeria	60,586	34,379
U. S. America	3,782	16,883
Other countries	4,003	2,146
Total tons	555,375	749,821

The trade on the whole has been a smooth one throughout the year, although values gradually attained a higher level than for some time previous, yet they have not experienced any of the wild fluctuations which characterised the preceding years. It would appear that such severe fluctuations will, as time goes on, disappear by reason of the steady increase of steam navigation and opening of hitherto inaccessible ports, which enable buyers to provide for their wants according to their requirements without being obliged to lay in large stocks. Trade.

The milling industry has been on the whole prosperous, Mills, having found a ready and profitable outlet for their produce.

Imports from British India have been much smaller than in the previous year, the crops there having been smaller.

In Russia, although the yields were considerably below previous years, there were very large reserves held back from the 1888-89 crops, so that Marseilles imported from that country the full quantity required.

The United States of North America sent only a small quantity to Marseilles, speculation there having maintained prices above an export basis.

Our stocks, for reasons explained above, are very small, amounting only to about 20,000 tons, so that prospects are in favour of a regular and profitable trade for the first half year at least. Prospects.

Imports of maize for distilling purposes have increased largely, Maize. having attained 134,000 tons, against 81,015 tons in 1888. It is now proposed to put a duty on all imports of foreign maize, 3 fr.* per 100 kilos.† being the tax anticipated, which, if enforced, will prove a serious impediment to future imports. It is thought to favour a large extension in distilling home products, such as beet.

Imports of oats have been 65,120 tons, against 38,421 tons in 1888. Oats.

Barley has also increased by 6,000 tons; imports for the year, 31,078 tons, against 25,156 tons in 1888. Barley.

The imports of oleaginous seeds for the year have amounted to 314,265 tons, against 278,527 tons in the previous year, being an increase of 35,000 tons, which was foreshadowed in last year's report. The crops of ground-nuts in the French colonies Oleaginous seeds.

* 25 fr. = 1l.

† 50 kilos. = 1 cwt.

(Coromandel coast) were very large, about 110,000 tons, and our imports of this article alone attained 97,374 tons, against 73,061 tons in the previous year. Likewise of coprah (produced chiefly in the South Sea Islands, Straits Settlements, and Java) we have received 46,000 tons, against 35,500 tons in the preceding year. Notwithstanding this large increase of production and imports, it is satisfactory to notice that consumption has augmented in much the same proportion, as the whole 314,265 tons of oleaginous seeds have been crushed by the local mills, and the oils produced have met with a ready and remunerative sale to local soap makers, as well as for export (the export tables show an increase of 7,000 tons of oil).

The average value of shelled ground-nuts during the year was 27 fr.* 50 c. per 100 kilos., or equivalent to 11 $\frac{1}{2}$ per ton.

Prospects for the coming year are less favourable as regards crops on the Coromandel and Madras coasts, which are said to have suffered from drought, and the yield is estimated at about 30,000 tons less than the foregoing year. Bombay crops, on the contrary, are reported good, so that our imports will probably be about the same.

Coprah and
palm kernels.

The coprah and palm kernel trade continues to increase steadily, and the quantity of coprah and palm kernels crushed in Marseilles in 1889, excluding the old stocks lying over from 1888, has exceeded 80,000 tons, yielding upwards of 40,000 tons of concrete oil, chiefly consumed by local soap mills. The value of this oil has ranged at about 55 fr. per 100 kilos.

Palm oil.

Imports of palm oil have amounted to 12,039 tons, against 11,551 tons in 1888. The French Government has granted a large subsidy to one of the leading companies of steamers to run a regular line to and from the different ports on the West Coast of Africa, which is a further facility in the way of extending the direct imports of palm oil and palm kernels, the chief articles exported from the said country.

Olive oil.

Imports of olive oil are fairly steady, being for the year 11,476 tons, against 12,435 tons in 1888.

Cotton seed.

Owing to the larger quantities of other seed oils produced by local mills, the imports of cotton oil show a large decrease, 7,700 tons against 11,445 tons in 1888. The average value has been 77 fr. 50 c. for American oil, and 67 fr. 50 c. for English oil, mostly from Hull.

Dried fruit.

I think it of importance to call attention to the large imports of dried fruit into Marseilles, chiefly currants from Greece and figs from Asia Minor, for distilling purposes. For the year 1889 the imports have comprised 33,840 tons of currants, and 15,938 tons of raisins, and 7,536 tons of figs.

Sugar.

Owing to the much larger production of beet sugar in France and its comparatively cheaper value, the imports of cane sugar have suffered a decrease, and for the year 1889 they only attained 78,853 tons (40,000 tons from French colonies, and 38,853 tons from Java), against 90,727 tons in the previous year.

* 25 fr. = 1 $\frac{1}{2}$.

The two refineries here have again enjoyed a very prosperous trade, having remained fully occupied throughout the whole year, and their products have continued to meet with a ready and profitable sale. The average value of refined sugar for French consumption has been 108 fr. to 110 fr. duty paid per 100 kilos., while for export (out of bond) it has been sold at an average value of 56 fr. per 100 kilos. Sugar refineries.

Imports of coffee have been on a par with the previous years, 15,979 tons, against 15,849 tons. This branch of commerce has been generally prosperous; severe fluctuations have been experienced by reason of extensive speculations on the terminal markets, but the general tendency of prices has been an upward one by reason of short crops in the Brazils, and importers have gained profitable results. Coffee.

The present crops of Rio and Santos coffee, as well as the Java crops, promise very short yields, so that prospects point to higher values for the coming year. Prospects.

The improvement in the home vintages has caused a further decrease in imports from other countries, and during the year 1889 the Marseilles imports have only been of 140,904 tons, against 162,296 tons in 1888. Values have rather decreased and favoured consumers; the average retail value of ordinary table wine being from 50 fr. to 55 fr. per hectolitre.* Wine and spirits.

The imports of coal from the United Kingdom have been 246,528 tons, against 346,304 tons in the previous year, being a falling-off of 99,776 tons. Coal.

The sale prices for Welsh coal at the beginning of the year was 22s. 6d. per ton delivered free on board, and at this price contracts were made for delivery free on board over the whole year. Sale prices.

The rise in prices in Wales and the high rates of freight were the cause of a steady rise in value here for current orders, which were executed at 26s. free on board during the three last months of the year. The average price of the year may be taken at 24s. 6d. free on board.

Freights ruled high during the whole year, the average rate being 10s. 10d. per ton. Freights.

As predicted in last year's report, the imports experienced a large falling-off, and we may expect to see a further decrease in the coming year by reason of the higher prices ruling at Cardiff. Prospects.

The total exports for the year 1889 have been 1,475,470 tons, against 1,543,934 tons in 1888. Exports.

The local flour mills have been actively employed during the year, and the results are generally profitable. The exports give a large increase of 63,153 tons, as against 58,826 tons in 1888. Flour.

Oils have also given a large increase, and seed-crushers have had a sound and profitable trade throughout the year, having been favoured with a steady increase in values; the export trade has gained an increase of 6,500 tons on the previous year, having attained 43,110 tons against 36,783 tons in 1888. Oils.

* 1 hectolitre = 22 gallons.

Oil-cakes.	In proportion with the augmentation of seed crushed, the quantity of oil-cakes produced has increased, and deliveries to the interior, as well as exports, have shown a considerable surplus on previous years. The exports have attained 59,219 tons, of which 51,000 tons are ground-nut cakes, against 53,863 tons in 1888. The average of ground-nut cake has been 12 fr.* per 100 kilos.†
Soap.	In soap also there is an increase of 1,700 tons, the year's exports being 10,184 tons, against 8,470 tons in 1888.
Candles.	The quantity of candles exported from Marseilles has amounted to 4,400 tons, against 3,967 tons in the previous year. This industry is very prosperous, and tends to increase further.
Refined sugar.	There is a falling-off in exports of refined sugar, which have been 42,603 tons, against 46,098 tons in 1888.
Ceramic industry.	The Ceramic industry has been fairly satisfactory, and deliveries for home requirements have been fully equal to the last three years, but for export there is a falling-off, in great measure owing to the unsettled state of affairs in Brazil during the latter part of the year. The total exports have been 126,806 tons, against 134,827 tons in the previous year.
Custom-house receipts.	The amount of duties levied in the district of the Marseilles custom house during the year 1889 was 2,445,392l.
Octroi receipts.	The sum realised by the octroi duties in the same period reached 407,400l.

Movement of the population.	Years.				Births.	Marriages.	Deaths.
	1888	..	..	..	11,124	2,964	10,871
	1889	..	..	..	11,178	2,948	10,819

The number of deaths registered are less than the figures for the previous twelve months, although during the month of December, 1889, 2,500 are ascribed to the influenza, which has been so prevalent all over the continent, and indeed all over the world.

LYONS.

Mr. Vice-Consul Ottley reports to me from Lyons as follows:—

Silk industry. The Lyonnese are justly proud of their section in the Silk Exhibition of 1889, and the hope that the admiration generally expressed at the richness and beauty of their exhibits will result in some permanent benefit to their manufacture is indulged in with some confidence.

The fluctuations in raw silk values during the year offer another example of the inability of any speculative syndicate to permanently control prices.

The year began with advanced prices, owing to the operations of the syndicate of December, 1888, but, notwithstanding an active business, a feeling of mistrust induced the manufacturers to

* 25 fr. = 1l.

† 50 kilos. = 1 cwt.

adopt a hand-to-mouth policy in buying, with the consequence that during the first six months prices slowly but steadily declined.

What the syndicate failed to do has, however, been brought about in the latter half of the year by the operation of the simple law of supply and demand.

A falling-off in the European crop, coupled with an active inquiry, caused a counter movement in July and August, and revealed a scarcity in certain descriptions which led to a continuous and gradual rise in prices, leaving them higher than at the beginning of the year.

Fine silks (European or Asiatic), spun on the European system, appear to have been most prominently in demand, especially has this been the case for the manufacture of goods dyed in the piece.

This branch of manufacture, which is barely 20 years' old, is now assuming large proportions, and is very ably seconded by the "ateliers" of preparation, dyeing, finishing, and embossing. The increase of power looms in this district is largely owing to the development of this class of manufacture; at the present time, with a radius of 50 miles, there are not less than 20,000 power looms, besides 50,000 to 60,000 hand looms, whilst the hand looms in the city, where the richer goods are made, will probably not exceed 12,000 to-day. This would appear to indicate the necessity of greater economy in the cost of production, and an increasing demand for goods of a cheaper nature.

The question of the renewal of the Treaties of Commerce at the expiration of 1891 is very seriously occupying this part of the country. The cocoon-growers, spinners, and thrusters are already agitating the question of a protective tariff, and propose that all foreign silks whatever shall be subject to a duty of—

					fr.	c.	
For Dry cocoons	..	..	..	..	1	50	per kilo.*
Raw silk	..	..	..	..	7	00	" "
Thrown silks	..	..	..	..	10	00	" "

The Lyonnese are taking action to combat these pretensions, as not only highly injurious to the manufacturing industry, but as tending to destroy the international character of the Lyons silk market.

It is difficult to estimate the effect of the duty imposed two years ago on Italian silks, as a higher exchange may sometimes have influenced transactions; but it is stated that the duty has had the effect of giving extension to the Milan silk market. The figures of the Milan Conditioning House are 5,182,000 kilos., or 5,182 tons in 1889, being an increase of 35 per cent. on 1887, would appear to support this contention.

The production of silk in France to-day is only about 13 per cent. of the Lyons total requirement. Taking the figures of the

* 1 kilo. = 2 lbs. 3 ozs.

Lyons Conditioning House for 1889 as 5,900 tons, these figures show an augmentation on the previous year of 14 per cent., and are divided in the following proportion:—

						Percentage.
France	..	..	..	..	..	13'31
Italy ..	..	..	..	..	..	19'63
Levant	..	..	..	..	..	19'32
Bengal	..	..	..	..	..	1'51
China	..	..	..	..	..	15'54
Canton	..	..	..	..	..	12'18
Japan	..	..	..	..	..	24'39
Tusseh	..	..	..	..	..	3'32
Spuns	..	..	..	..	..	0'85

The importations of silk manufactures into France in 1889 are 2,445,680*l.*, an increase of 15 per cent. on 1887.

The exports from this district to New York for 1889 were 6,800,000*l.*, an augmentation on the preceding year of about 6 per cent.

The year 1889 would appear to have been decidedly favourable for the silk industry.

RETURN of the Principal Articles of Import and Export to and from Marseilles during the Years 1889-88.

IMPORTS.

Articles.	1889.	1888.
	Quantity.	Quantity.
	Tons.	Tons.
Wheat	555,378	749,821
Maize	134,030	81,015
Oats	65,121	58,421
Barley	81,078	25,156
Oil seeds	314,265	278,527
Palm oil	12,039	11,551
Tallow	3,247	4,195
Olive oil	11,476	12,435
Cotton oil	7,700	11,445
Sugar (raw cane)	78,853	90,727
Coffee	15,975	15,849
Wine and spirits	140,904	162,296
Cod fish	3,252	3,399
Coal (United Kingdom)	246,528	346,304
Other articles	734,566	642,296
Total	2,354,412	2,493,437

MARSEILLES.

9

EXPORTS.

Articles.		1889.	1888.
		Quantity.	Quantity.
		Tons.	Tons.
Wine, spirits, and beer	..	35,057	45,800
Wheat	.. ..	53,549	59,622
Flour	.. ..	63,153	56,826
Oil cakes	.. ..	59,219	53,863
Soap	.. ..	10,184	8,470
Oil	.. ..	43,110	36,783
Candles	.. ..	4,400	3,967
Refined sugar	.. ..	42,603	46,093
Ceramic industry	.. ..	126,806	134,827
Other articles	.. ..	1,037,382	1,134,461
Total	.. ..	1,475,470	1,543,934

RETURN of all Shipping at the Port of Marseilles for the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
English	12	7,988	573	715,463	585	723,451
French	2,119	216,622	4,036	2,869,795	6,155	3,086,417
Italian	489	110,987	146	114,554	635	225,491
Dutch	2	1,423	66	89,627	68	91,055
Spanish	165	12,116	340	295,145	505	307,261
Greek	301	82,797	39	30,288	340	113,085
German	21	10,842	53	48,421	74	59,263
Swedish	75	35,445	36	28,824	111	64,269
Austrian	86	40,500	15	8,246	101	48,746
Russian	7	4,470	2	1,160	9	5,630
Danish	11	3,080	9	6,712	20	9,792
Turkish	17	3,727	...	...	17	3,727
Total	3,305	529,962	5,305	4,208,235	8,610	4,738,187
" for the preceding year	3,196	523,988	5,188	4,341,037	8,384	4,865,025

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
English	11	7,744	566	720,717	577	728,461
French	1,911	193,887	4,063	2,851,569	5,974	3,045,447
Italian	487	111,918	151	117,893	638	229,811
Dutch	2	1,423	66	89,627	68	91,055
Spanish	170	12,634	338	293,861	508	306,495
Greek	293	84,581	40	29,657	333	114,188
German	22	11,799	52	47,608	74	59,407
Swedish	73	31,986	38	29,740	111	61,726
Austrian	80	37,844	15	8,246	95	46,090
Russian	6	3,448	2	1,160	8	4,608
Danish	10	2,907	9	6,712	19	9,619
Turkish	14	3,060	...	...	14	3,060
Total	3,079	503,186	5,330	4,196,781	8,409	4,699,967
" for the preceding year	2,866	480,916	5,170	4,318,531	8,036	4,799,447

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ON THE
TRADE OF BREST.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 505.

Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1890.

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FRANCE.

BREST.

Consul Haggard to the Marquis of Salisbury.

My Lord,

Brest, April 8, 1890.

I HAVE the honour to transmit to your Lordship herewith my Commercial Report for the year 1889.

I have, &c.

(Signed) : JOHN G. HAGGARD.

Report on the Trade and Commerce of Brest for the Year 1889.

TRADE AND COMMERCE.

The returns of British shipping indicate about the same average as preceding years. The value of British imports appears increased, but, in some instances, exports show a considerable decline.

The English egg merchant, who used to forward large quantities of eggs to the London market, has left Finistère, nor can I discover that any one has taken his place. The decay of the Brittany egg trade is probably attributable to the Franco-Italian Treaty difficulties. On account of this vast quantities of Italian eggs, which were formerly sent to Paris, are now diverted to the London market, and these compete with the Brittany eggs. In spite of the cost of carriage, however, eggs are so cheap in the country districts in Brittany that energetic business men would still probably be able to recreate a remunerative trade in eggs to England.

SHIPPING AND NAVIGATION.

Two new stone lighthouses have been erected at La Vielle Lighthouses. (Finistère) and Grands Cardinaux (Morbihan) respectively. These

are both on isolated and sea-bound rocks. A lighthouse has also been erected at the end of the jetty at Port Vendres; this lighthouse is supported upon metal columns.

New wharf at Lorient.

The first portion of the new wharf at the entrance to the commercial harbour at Lorient is now completed. There is an average depth of 18 feet of water at low tide. This new wharf will materially benefit the large English steamers engaged in the grain trade with the south of Europe, which frequently come to Lorient.

Steam crane.

The new steam crane will probably be placed in position in a month or two.

AGRICULTURE.

Cereals.

The cereal crops have been under the average of the past 10 years, except in the case of wheat, which shows an increase of 19 per cent., and millet, which shows an increase of 1 per cent. Prices have undergone a considerable diminution.

Potatoes.

The trade in potatoes between Great Britain and Roscoff and Pont l'Abbé, in Brittany, has been lately decreasing, and last year at Roscoff had sunk to almost nothing, owing to the deterioration in the quality of the potatoes. This is occasioned by the short-sightedness of the peasants engaged in their cultivation, who persist in always sowing from their own seed over and over again. This inbreeding threatens to put an entire stop to the huge potato trade which has for some years existed. The peasants decline altogether to go to the expense of new seed, but would certainly use it if it were given, as was originally the case.

The soil of Roscoff and Pont l'Abbé is peculiarly favourable to the cultivation of the potato, and if some English merchants chose to ship gratis a certain quantity of good seed potatoes, there is no doubt a revival of the former trade would result.

Beetroot.

Of beetroot 8,000 tons were grown in the Morbihan only for fodder. None is grown for the manufacture of sugar.

Apples.

The apple crop has, this year, been an almost complete failure, with the result that cider (the chief beverage of the agricultural population), being scarce and dear, an increased quantity of wine was consumed. Apples were largely imported from Spain to supplement the scarcity of the French crop.

Chestnuts.

The chestnut crop was much below the average.

Live stock.

Live stock in the department of Morbihan shows an extraordinary decrease since the last returns two years ago, except in the case of sheep, which have increased about 1,300, and pigs, of which 5,000 more are reported this year.

Cattle breeding.

Cattle breeding in Brittany appears to be languishing, mostly on account of the prohibition against shipping beasts to England from this neighbourhood. During the past two years, however, I have been unable to hear of any disease now existing, and therefore the embargo seems needless. If it were removed, the trade of Great Britain with this coast would be much more cordially received. There is a strong feeling here against the duty-free

importation of wool, tallow, and offal from England, when no reciprocal advantage can be obtained by the French cattle-breeders being allowed to trade with England.

Farmyard manure and lime are chiefly employed, but phosphates have been introduced; hitherto, however, they have made little way; but it should be borne in mind that the Breton peasant is slow to exchange old methods for new, even when the latter present apparent advantages. In the future, therefore, there may be room for a further opening of British trade in guano and artificial manures.

FISHERIES.

Sardines were very abundant, and the price low in 1889; but owing to the glutting of the market by cheap, inferior Spanish goods, the French manufacturers were unable to compete favourably. The syndicate, which was almost completed to purchase the whole of the sardine works in Brittany, collapsed at the last moment in consequence of local jealousies.

Oysters are abundant, but the proprietors complain of the low prices at which they are compelled to sell. According to the report of the expert employed by the French Government to examine into the condition of the oyster beds, it would appear that they are considerably over-fished round Brittany.

A smaller output, therefore, would serve the twofold purpose of raising prices and increasing the value of the beds, but no precautions of the kind appears so far to have been taken.

POPULATION AND INDUSTRIES.

Vice-Consul Jullien reports:—"During the past year two new mills have been added to the extensive works of Hennebont, thus giving employment to about 100 additional workpeople, the number of whom altogether exceeds 1,000. These works are, without doubt, the most important of their kind in France at present; their monthly consumption of coal exceeds 2,000 tons, nearly the whole of which is supplied to them from Newport, Monmouthshire."

QUANTITY Produced and Average Price of Cereals in the Department of Finistère.

1889.

Cereals.	Quantity. Produced.	Average Price per Quarter.		
		Quarters.	£	s. d.
Wheat	228,164		2	3 8
Meslin	27,760		1	11 8
Rye.. .. .	159,813		1	7 11
Barley	175,297		1	4 4
Oats	491,701		0	19 5

QUANTITY Produced and Average Price of Cereals in the
Department des Côtes-du-Nord.

1889.

Cereals.				Quantity Produced.	Average Price per Quarter.
				Quarters.	£ s. d.
Wheat	..	..	..	583,100	2 16 2
Meslin	..	..	..	51,450	1 16 9
Rye..	..	..	..	171,500	2 6 7

QUANTITY of Cereals Produced in the Department of Morbihan.

1889.

Cereals.				Quantity Produced.
				Quarters.
Wheat	..	..	..	208,115
Meslin	..	..	..	2,472
Rye..	..	..	..	374,282
Barley	..	..	..	1,029
Buckwheat..	..	..	..	288,120
Oats	..	..	..	151,533
Millet	..	..	..	12,763

RETURN of all Shipping at the Port of Brest for 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	11	1,081	28	22,570	49	23,651
French ...	111	9,128	11	6,264	122	14,392
Swedish and Norwegian ...	5	1,574	7	3,156	12	4,730
Other countries ..	2	450	5	3,097	7	3,547
Total ...	129	12,233	61	34,087	190	46,320
" for preceding year ...	138	15,740	66	35,510	204	50,250

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	14	2,030	22	19,485	47	21,515
French ...	157	16,998	13	5,537	190	22,535
Swedish and Norwegian ...	4	1,274	3	3,305	12	4,579
Other countries ...	3	606	3	2,392	6	2,998
Total ...	178	20,908	57	30,719	235	51,627
" for preceding year ...	183	24,786	59	30,773	242	55,559

RETURN of Principal Articles of Export from Brest during the
Years 1888-89.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Potatoes	..	..	100	584
Salt meat	25	1,700	..	..
Bones	394	1,800	412	2,007
Vegetable tar	100	700	..	..
Empty casks	907	840	..	..
Total	1,426	5,040	512	2,541

RETURN of Principal Articles of Import at Brest during the
Years 1888-89.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wine... ..	Gallons ...	4,334,887	88,000	51,266	9,333
Rum... ..	" ..	..	..	62,229	33,943
Coal... ..	Tons ...	36,189	43,413	27,400	35,511
Timber	" ..	12,836	31,000	16,004	109,040
Wheat	" ..	..	..	441	5,976
Bran... ..	" ..	1,500	300	2,000	912
Vegetable tar	" ..	400	2,328	303	2,466
Lobsters and fish	" ..	241	35,920	271	38,969
Bar iron	" ..	..	..	203	1,442
Cast iron	" ..	177	992	70	398
Flour	" ..	604	4,600	..	..
Other articles	" ..	1,556,000	39,553	1,150	9,075
Total	{ Gallons ...	1,334,887	246,606	113,495	247,065
	{ Tons ...	1,607,947	..	57,843	..

TOTAL Value of all Articles Exported from and Imported into
Brest during the Years 1888-89.

Country.	Exports.		Imports.	
	1889.	1888.	1889.	1888.
	£	£	£	£
Great Britain	4,236	2,564	50,505	38,835
U.S. of America	..	..	400	..
Germany	..	..	4,874	..
Holland	..	..	969	..
Spain	..	..	117,815	42,728
Other countries	840	..	67,493	157,947
Total	5,076	2,564	242,056	239,510

RETURN of all Shipping at the Port of Morlaix for 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	30	2,726	3	365	33	3,091
French... ..	31	2,450	...	...	31	2,450
Swedish and Norwegian... ..	17	4,481	...	...	17	4,481
Other countries	9	1,240	...	...	9	1,240
Total	87	10,897	3	365	90	11,262

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	18	2,231	3	365	21	2,596
French... ..	21	1,532	...	...	21	1,532
Swedish and Norwegian... ..	17	4,481	...	...	17	4,481
Other countries	7	944	...	...	7	944
Total	63	9,188	3	365	66	9,553

RETURN of Principal Articles of Export from Morlaix during the Years 1888-89.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Farm produce	..	..	200	3,742
Fresh fruit	..	..	5	11
Vegetables	54	320	..	..
Cereals	33	222	15	102
Timber and pit-props ..	1,970	1,960	1,877	1,890
Other provisions	349	418	..	..
Total	2,406	2,920	2,097	5,745

RETURN of Principal Articles of Import at Morlaix during the Years 1888-89.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coal and coke	10,078	1,285	5,315	5,617
Timber	6,975	2,300	6,699	16,030
Wheat	1,274	11,212	302	3,167
Phosphate	..	..	330	816
Hemp and flax.. ..	66	1,200	174	4,964
Other articles	1,163	13,180	1,112	3,272
Total	19,556	29,177	13,332	33,875

**TOTAL Value of all Articles Exported from Morlaix and Imported
from Morlaix during the Years 1888-89.**

Country.	Export.		Import.	
	1889.	1888.	1889.	1888.
	£	£	£	£
Great Britain	2,919	5,810	21,301	73,314
Sweden and Norway ..	..	..	15,891	15,273
Germany	..	..	10,280	3,715
Russia	..	..	800	5,116
Other countries	..	..	309	2,664
Total	2,919	5,810	48,581	102,082

**RETURN of all Shipping at the Port of Le Légué (St. Brieuc)
in 1889.**

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	77	6,256	121	7,451	198	13,707
French	39	5,127	...	...	39	5,127
Swedish and Norwegian	21	4,125	...	...	21	4,125
Other countries	7	1,119	1	153	8	1,272
Total	144	16,627	122	7,604	266	24,231
" for the year preceding...	92	11,055	153	11,554	276	24,360

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	81	5,706	115	7,703	196	13,409
French	44	5,390	...	...	44	5,390
Swedish and Norwegian	21	4,125	...	...	21	4,125
Other countries	7	1,119	1	153	8	1,272
Total	153	16,330	116	7,856	189	24,186
" for the year preceding...	118	14,365	152	10,867	270	25,232

**RETURN of Principal Articles of Export from Le Légué
(St. Brieuc) during the Years 1888-89.**

				Quantity.	Value.
				Tons.	£
1889	..	..	..	8,442	61,901
1888	..	..	..	3,065	24,640

RETURN of Principal Articles of Import at Le Légué
(St. Brieuc) during the Years 1888-1889.

				Quantity.	Value.
1889	..	..	..	Tons.	£
1888	..	..	..	30,363	56,900
				26,985	90,236

TOTAL Value of all Articles Exported from and Imported at
Le Légué (St. Brieuc) during the Years 1888-89.

Country.				Exports.		Imports.	
				1889.	1888.	1889.	1888.
				£	£	£	£
Great Britain	..	..	..	61,901	30,560	53,380	56,572
Sweden	..	..	..	..	67	2,600	17,286
Norway	..	..	..	..	..	..	..
Russia	..	..	..	..	..	920	16,350
Other countries	..	..	..	..	..	..	..
Total	..	..	..	61,901	30,627	56,900	90,208

RETURN of Exports at Pont l'Abbé, Finistère.

Articles.				1889.	1888.
				Tons.	Tons.
Potatoes	..	..	..	39,480	72,606
Pit-props	..	..	..	38,900	37,020
Total	..	..	..	78,380	..

RETURN of Imports at Pont l'Abbé, Finistère.

Articles.				1889.	1888.
				Tons.	Tons.
Coal	..	..	..	17,020	31,514

RETURN of all Shipping at the Port of Lorient in 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	91	7	2,908	8	2,999
French	58	7,967	...	...	58	7,967
Swedish and Norwegian	11	1,807	1	444	12	2,251
German	2	424	2	784	4	1,208
Total	72	10,289	10	4,136	82	14,425
„ for preceding year	68	9,300	14	6,647	82	15,947

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	91	5	1,874	6	1,965
French	106	14,347	2	986	108	16,333
Swedish and Norwegian	15	2,262	...	...	15	2,262
Danish	1	130	...	...	1	130
German	2	424	2	1,050	4	1,474
Other countries	...	...	1	296	1	296
Total	125	17,254	10	4,206	135	21,460
„ for preceding year	32	4,097	2	853	34	4,509

RETURN of Principal Articles of Import at Lorient during the Years 1888-89.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Coal	Tons	49,812	44,830	48,386	38,370
Building timber	„	5,040	17,606	5,720	18,300
Cod roes	„	1,590	25,440	1,537	24,390
Olive oil	„	359	20,104	202	11,300
Wine and brandy	Gallons	138,080	14,915	24,230	2,626
Corn and flour	Tons	2,776	18,330	7,085	71,558
Other articles	„	286	13,991	2,130	23,702
Total	Gallons	138,080	14,915	24,230	2,626
	Tons	59,873	140,301	65,060	103,320

RETURN of Principal Articles of Export from Lorient during the Years 1888-89.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Wine and brandy	Gallons	4,412	£ 476	4,428	£ 434
Coal	Tons	1,253	1,128	1,530	1,172
Pitprops and timber	„	6,905	6,492	2,986	4,042
Tinplates and lead	„	147	3,976	174	4,502
Olive oil	„	43	2,439	89	4,960
Preserved vegetables	„	117	3,767	119	3,820
Other articles	„	173	3,640	917	6,647
Total	Gallons	4,412	476	4,428	434
	Tons	8,638	21,442	5,615	24,043

TOTAL Value of all Articles Exported from and Imported at
Lorient during the Years 1888-89.

Country.	Exports.		Imports.	
	1889.	1888.	1889.	1888.
	£	£	£	£
England	3,920	4,540	43,650	36,420
Sweden and Norway ..	..	..	32,830	33,590
Russia	480	988	6,270	9,300
Spain and Portugal ..	15,270	16,300	20,400	27,600
Italy	..	..	9,850	11,926
Other countries ..	2,248	2,651	42,216	67,110
Total	21,918	24,477	155,216	185,946

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REFERENCE TO PREVIOUS REPORT, Annual Series No. 400.

*Presented to both Houses of Parliament by Command of Her Majesty,
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FRANCE.

NANTES.

Consul Pouncefote to the Marquis of Salisbury.

My Lord, *Nantes, April 25, 1890.*

I HAVE the honour to subjoin my Report on Agriculture in this district for the year 1889. Mr. Vice-Consul Warburton's Report on La Rochelle has already been transmitted to your Lordship;* and I now beg to annex the Report of Mr. Consular-Agent Link at Tonnay Charente.

The general result of the Agricultural Year 1889 was unfortunately a low average, the total yield of the crops being from 25 per cent. to 30 per cent. less than that in 1888, which was certainly not a favourable year. On the other hand the grain in 1889 was very good and exceptionally rich in gluten. Straw was so abundant that it is selling even now at very low prices.

The hay crop was magnificent and so plentiful that a large stock remains on hand, and it is difficult to find purchasers on the spot at excessively low prices.

Although this part of the country is so renowned for good fruit very little was gathered in 1889, and as it had not sufficiently ripened it did not keep. This was attributed to a continued excess of dampness in the air. Scarcely any apples were collected for the manufacture of cider. Vegetables, favoured by continual rain, were produced in abundance, and sold at unusually low prices.

The vintage was disastrous, the yield being one-third less than in 1888. This unfortunate result was due to the ravages of phylloxera and mildew, to atmospheric disturbances and persistent rains. The vine-growers are living on their savings, and are under the apprehension that the vines are irretrievably ruined.

The position of farmers shows no improvement, but those carrying on "la petite culture" in the vicinity of towns have the advantage of disposing of their market produce without difficulty. There are no signs of any abatement in the agricultural crisis which has prevailed for so many years. It is now generally

* No. 618, Annual Series.

admitted that one of the chief causes of the depression is the baneful effect of the constant sub-division of land. The Government has always been ready to protect the powerful agricultural interest; but the whole question is surrounded by so many difficulties that hitherto no effectual remedy has been found for the present unsatisfactory position of agricultural affairs. Notwithstanding the increased duties on corn and cattle, which came into operation in 1885, and which experience has shown to have caused more harm than good, the agricultural classes unanimously denounce the existing commercial treaties and demand their revision in the sense of a highly protective tariff. These views will no doubt have great effect on the Government when the question of the renewal of the treaties will have reached the stage of practical discussion with Foreign Powers. So much has already been written on the state of agriculture in France that I can find no fresh topic of interest to bring to light; but I may make a few observations on the manure trade, in which British manufacturers should have a share, considering the low terms on which they procure the requisite raw materials.

Artificial
manures.

In a Review on Agriculture in France the writer, Mr. Jules Grandeau, strongly advocates the use of manures to increase the yield of the soil. He points out that the manure produced on a farm, unless supplemented by chemical manures, is in most cases totally insufficient to insure good crops. This has been fully demonstrated by the data supplied on samples of grain exhibited in the late General Exhibition in Paris. Every effort should, therefore, be made to impress on agriculturists the paramount importance of having recourse to artificial manures of good quality.

Two laws for the protection of agricultural interests have of late been passed by the Legislature. The law of March 21, 1884, on Professional and Agricultural Syndicates, and that of February 4, 1888, for the Repression of Frauds in the Manure Trade. Both these laws tend to free cultivators, particularly those carrying on "la petite culture," by far the most numerous class, from the shameful practices they were subjected to by unscrupulous merchants. Formerly, with but few exceptions, samples of manure with high-sounding names were exposed at exhibitions and agricultural meetings in the country, but no indication was given as to their component parts and real value. The discredit so long attached to chemical manures is mainly attributable to the deceptions and consequent losses to which cultivators were subjected. The exhibition of 1889 materially modified this state of things, for what with the progress in science and in the art of agriculture, and perhaps owing to the provisions of the law of 1888, the manure trade was represented by exhibits with analyses of their composition, the accuracy of which being guaranteed by the manufacturer. There are many firms of undoubted respectability in the trade; but owing to the small quantity of manure required by peasant proprietors and small tenants, they find it impracticable to obtain it direct from works at

a distance, as they would have to pay not only retail prices, but also a heavy rate of carriage by rail. Thus they become the dupes of swindling commercial travellers who swarm over the country during winter and spring, and skilfully manage to evade the provisions of the law. As a remedy to this state of things, Mr. Grandeau urges agriculturists to eschew resolutely all transactions with commercial travellers, and to apply for their requirements to the nearest agricultural syndicate. These syndicates are spreading rapidly all over France, and in January, 1889, numbered 557. They are in a position to purchase manures wholesale from respectable houses, who, in conformity with the law of 1888, guarantee the accuracy of the analysis of their products. Moreover, as the orders are executed by wagon-load, a considerable economy is effected in railway carriage. Agricultural syndicates.

British manufacturers who are prepared to sell their manures on similar terms, and also manufacturers of agricultural implements, would do well to place themselves in communication with these syndicates. For their information, and of those interested in the subject, I may mention that the "Annuaire des syndicats professionnels, industriels, commerciaux et agricoles" in France, published under the instructions of the Ministère de Commerce, may be obtained of Messrs. Berger, Levrault, et Cie, booksellers, Rue des Beaux-Arts, No. 5, Paris. British manufacturers.

I have, &c.

(Signed) B. PAUNCEFOTE.

Mr. Consular-Agent Link to Consul Pouncefote.

Tonnay Charente, February 26, 1890.

The culture of the vine is the principal industry in this consular district. The quantity of wine produced during the year 1889 has been inferior to that of 1888 by 30 per cent. on the white wine for distilling purposes, owing, in a great measure, to mildew which remained rebellious to the curatives employed. The wine was, however, of better quality, and contained a higher degree of alcohol than that of 1888. Red table wine, although more abundant, fell also short of the 1888 vintage, and prices rose proportionally. The vine.

The grafting of the French vine on American roots continues to give satisfaction, and is appreciated as to the good results of resistance to the phylloxera.

Wheat, barley, and oats are produced in small quantities, and for home consumption only, but quite insufficient to meet the requirements, owing to the primitive means used in their culture, and the injudicious choice of the quality of the seeds, and also of the vine culture being more profitable, and requiring less labour. Cereals.

Syndicates, which have been formed in different parts of the district, are now using strenuous measures to bring the farmers to

cultivate cereals on a larger scale by adopting a better system of tilling the land and using seeds especially adapted thereto. They urge the improvement of the quality and quantity of the wheat, by sowing all golden drop (Scotch), the squarehead, the Chidham, and the yellow Australian wheat.

Beetroot. The culture of this root has been strongly advocated by the syndicates as a remunerative product. It has been tried last year with success.

Hay. The crop of hay has been abundant, and of excellent quality. The prices were low, selling at 35 fr. to 40 fr. per 1,000 kilos.

Horses and
horned cattle. The breeding of horses and cattle is progressing considerably. Government is encouraging this industry by paying good prices for the horses. Saddle horses are paid from 45*l.* to 55*l.* per head, and draught horses at 35*l.* to 50*l.*

Bullocks have been sold readily during the year at 1*s.* to 1*s.* 2*d.* per kilo. in the skin, and cows at 10*d.* to 1*s.* per kilo.

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No. 734.

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AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1889
ON THE
TRADE OF DUNKIRK.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 506.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1890.*

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FRANCE.

DUNKIRK.

Consul Taylor to the Marquis of Salisbury.

My Lord,

Dunkirk, May 5, 1890.

I HAVE the honour to transmit to your Lordship, herewith enclosed, my Report for the year 1889 on the Trade and Commerce of the Port of Dunkirk.

I have, &c.

(Signed) EDWARD TAYLOR.

Report on the Trade and Commerce of the Port of Dunkirk for the Year 1889.

In my report for the year 1888, I spoke of the continued prosperity of Dunkirk, a port which ranks as the fourth in France in point of commercial importance. This prosperity still continues, for although in 1889 the imports decreased 4,592 tons, yet the exports gave the very large increase of 83,398 tons; and shipping entering inwards also increased 50,886 tons. Increase in tonnage and exports.

The works on the docks are making much progress, but at least three years will elapse before the completion of the new lock, which is to have a sufficient depth of water on the sill to admit vessels drawing 34 feet to 35 feet. The municipality and Chamber of Commerce have decided to guarantee a sum of 200,000*l.*, to be employed in widening the entrance between the piers; and when this is done, coupled with the new lock, which will admit the largest vessels, there will be nothing to prevent Dunkirk being as pre-eminent in the North of France as Marseilles is in the South. Harbour works.

The population of Dunkirk, according to the census of 1886, was 39,195; during the year 1889, there were 1,344 births and 1,024 deaths. Of the births, 690 were masculine and 654 feminine; of the deaths, 530 were masculine and 494 feminine. 312 marriages were celebrated and 20 divorces given during the year. Out of the total number of 1,344 births, 131 were illegitimate. Population.

Notwithstanding the inefficient drainage, Dunkirk may be considered a healthy place. An old lady who had lived in the town all her life died in December, aged 102 years.

Iceland
fishery.

The Iceland fishery of 1889 was a very successful one for the seamen, on account of the quantity of fish taken; but owing to the owners failing to keep an arrangement not to sell the fish under a fixed minimum price, they complain that it was not a profitable season for them. The fleet numbered 87 vessels, tonnage 9,246 tons, and was manned by 1,439 seamen. The whole of the fleet safely returned to Dunkirk, bringing 7,558 tons of codfish and 714 tons of oil, being an increase of 2,367 tons of fish and 460 tons of oil compared with 1888. The fleet of 1890 numbered 72 vessels, tonnage 8,098 tons, manned by 1,258 men. The first vessel cleared from Dunkirk for the fishing grounds on March 4, and the whole of the fleet left before the end of the month.

RETURN of all Shipping at the Port of Dunkirk in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	378	146,616	921	482,419	1,299	629,035
French	562	85,166	570	477,083	1,132	562,249
German	37	16,797	84	40,516	121	57,313
Swedish and Norwegian	59	21,111	23	11,321	82	32,432
Danish	22	3,254	29	23,899	51	27,153
Dutch	2	358	70	18,273	72	18,631
Spanish	...	...	12	11,496	12	11,496
Russian	14	5,415	5	3,429	19	8,844
Italian	2	871	3	4,693	5	5,564
Belgian	9	784	31	3,423	40	4,207
United States	3	3,072	...	...	3	3,072
Austrian	2	1,410	...	...	2	1,410
Greek	...	...	1	704	1	704
Argentine	1	486	...	...	1	486
Total	1,091	285,340	1,749	1,077,256	2,840	1,362,596
" for the year preceding...	1,212	325,135	1,659	986,575	2,871	1,311,710

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	370	142,128	906	477,695	1,276	619,823
French	583	88,032	560	469,790	1,143	557,822
German	30	12,538	85	40,659	115	53,197
Swedish and Norwegian	58	21,556	24	11,769	82	33,325
Danish	25	4,498	30	24,137	55	28,635
Dutch	1	87	74	20,291	75	20,378
Spanish	...	...	13	12,147	13	12,147
Russian	16	6,181	5	3,429	21	9,610
Italian	1	529	3	4,693	4	5,222
Belgian	2	762	31	3,305	33	4,067
United States	3	3,427	...	...	3	3,427
Austrian	2	1,410	...	...	2	1,410
Greek	...	...	1	704	1	704
Argentine	1	486	...	...	1	486
Total	1,092	281,624	1,732	1,068,619	2,824	1,350,243
" for the year preceding...	1,227	319,943	1,657	989,076	2,884	1,309,019

The table of shipping entered compared with the year 1888 shows a decrease of 31 ships, but an increase in tonnage of 50,886 tons.

There was a falling-off both in the number and tonnage of sailing vessels, the total decrease being 121 vessels, tonnage 39,795 tons, divided as follows:—Decreases: British, 1 vessel, 4,396 tons; French, 7 vessels, 318 tons; German, 40 vessels, 3,406 tons; Swedish and Norwegian, 22 vessels, 8,968 tons; Danish, 16 vessels, 2,557 tons; Dutch, 9 vessels, 2,076 tons; Italian, 23 vessels, 12,515 tons; Russian, 6 vessels, 2,169 tons; United States, 4 vessels, 4,503 tons; and Austrian, 1 vessel, 146 tons. Increases: Belgian, 7 vessels, 775 tons; and Argentine, 1 vessel, 486 tons. Sailing vessels decrease.

Steamers show a total increase of 90 vessels, 90,681 tons, divided as follows:—Increases: French, 112 steamers, 128,961 tons; Swedish and Norwegian, 7 steamers, 5,236 tons; Dutch, 603 tons; Spanish, 6 steamers, 5,378 tons; Russian, 2 steamers, 1,579 tons; Italian, 1 steamer, 1,007 tons. Decreases: British, 13 steamers, 32,672 tons; German, 7 steamers, 5,676 tons; Danish, 13 steamers, 6,398 tons; Belgian, 1463 tons; Greek, 4 steamers, 4,114 tons; Portuguese, 2 steamers, 980 tons; and Austrian, 1 steamer, 780 tons. Steamers increase.

The British total of 1,299 vessels, 629,035 tons, entered in 1889, shows a decrease of 14 vessels, 37,068 tons, compared with 1888, in which year, however, there was an increase of 88,460 tons. This decrease was chiefly in the indirect or carrying trade, and may be said to have been owing to the good harvest in France, causing a vast decrease in the imports of wheat and oats, wheat falling from 167,196 tons in 1888 to 74,051 tons in 1889. Entered in the direct trade (from United Kingdom and colonies) with cargoes, 701 vessels, 220,337 tons; in ballast, 187 vessels, 9,186 tons; total, 888 vessels, 229,523 tons. Entered in the indirect or carrying trade (from foreign countries), with cargoes, 389 vessels, 388,604 tons; in ballast, 22 vessels, 10,908 tons; total, 411 vessels, 399,512 tons. British tonnage ; decrease.

Cleared, a total of 1,276 vessels, 619,823 tons, divided as follows:—For the United Kingdom, with cargoes and part cargoes, 677 vessels, 187,136 tons; in ballast, 513 vessels, 353,839 tons; together, 1,190 vessels, 540,975 tons; and in the indirect or carrying trade (to foreign countries), 52 vessels, with cargoes or part cargoes (some of the part cargoes were not shipped at Dunkirk), tonnage 46,423 tons; in ballast, 34 vessels, 32,425 tons; total, 86 vessels, 78,848 tons. Direct trade.

The chief increase in our carrying trade was in vessels entering with cargoes from the United States, and the chief decrease in those entering from Russia. The entries from Portugal fell from 7,653 tons to 221 tons, owing to the cessation of imports of Portuguese pyrites. Indirect or carrying trade.

In 1889 our principal carrying trade was from the following countries:—From Chili, net register tonnage 75,938 tons, increase 6,879 tons; United States, 74,821 tons, increase 30,117 tons; (906) A 3

Russia, 70,981 tons, decrease 33,316 tons; Argentine Republic, 58,570 tons, increase 4,192 tons; Spain, 28,295 tons, increase 1,654 tons; Roumania, 27,702 tons, decrease 10,947 tons; Algeria, 18,304 tons, increase 2,656 tons; Sweden and Norway, 12,193 tons, increase 4,063 tons; Egypt, 6,800 tons, decrease 6,173 tons; Germany, 2,461 tons, decrease 4,774 tons; Turkey, 3,194 tons, decrease 95 tons; and Morocco, 2,459 tons, decrease 335 tons.

British shipping arriving from India in 1889 amounted to 49,108 tons, a decrease of 22,364 tons; and from Australia to 2,848 tons, a decrease of 10,777. These reductions were owing to the small quantity of wheat imported.

The total tonnage of all nations (French coasting trade and Iceland fishery excepted) entering Dunkirk with cargoes was 1,101,831 tons, of which 608,941 tons were British.

British
shipping first
quarter of
1890; in-
crease.

To judge from the arrivals to the end of April, this year will show a considerable augmentation in British shipping. During the quarter ended March 31, 1890, there was a large increase in our ships compared with the corresponding quarter in 1889 (also a very heavy quarter); the number entering amounted to 451 vessels, tonnage 235,141 tons, an increase of 77 vessels, 37,963 tons. This is very satisfactory, as the total increase of all shipping only amounted to 30,461 tons.

French
shipping,
increase.

Of the 1,132 French vessels, 562,249 tons, which entered in 1889, upwards of 656 vessels, 218,502 tons, entered in the coasting trade, which is entirely reserved for French vessels.

The very great increase in French shipping of 105 vessels, 128,643 tons, compared with the year 1888, was in arrivals from the Argentine Republic, which show an increase of 30 vessels and 74,019 tons; from Spain an increase of 28 vessels and 29,886 tons; and in the coasting trade an increase of 64 vessels, 19,076 tons. The other changes call for no especial comment, except that there was a reduction of nearly one-half in the French tonnage entering from Algeria, which was 13,274 tons in 1888, and 7,322 tons in 1889.

The entries of French shipping, with cargoes from foreign countries and French colonies, were as follows:—From the Argentine Republic, 61 vessels, 136,977 tons; Spain, 209 vessels, 124,386 tons; Chili, 20 vessels, 26,443 tons; Germany, 20 vessels, 10,883 tons; Algeria, 10 vessels, 7,322 tons; Senegal, 6 vessels, 6,150 tons; Morocco, 11 vessels, 4,019 tons; Portugal, 25 vessels, 3,966 tons; United Kingdom, 10 vessels, 2,714 tons; French Indies, 1 vessel, 1,147 tons; Hayti, 3 vessels, 1,115 tons; Uruguay, 1 vessel, 1,041 tons; Russia, 1 vessel, 943 tons; and Sweden, 1 vessel, 163 tons.

French ton-
nage from
Argentine
Republic;
large increase.

Although there has been a large increase in the imports from the River Plate, it was not sufficient to account for an addition of 74,019 tons in French tonnage entering Dunkirk from the Argentine Republic. This increase has been to a large extent owing to the Chargeur Reunis Steamship Company having placed more and larger vessels on the service, and that these vessels in some instances only brought small or part cargoes to Dunkirk.

The increase of 29,886 tons in French tonnage from Spain was owing to the larger imports of iron ore.

Cleared in the French coasting trade from Dunkirk with cargoes and part cargoes, 736 vessels, 236,698 tons; in ballast, 37 vessels, 7,005 tons; total, 773 vessels, 243,703 tons. Cleared in carrying trade to foreign countries and colonies, 138 steamers, 174,674 tons (an increase of 49 steamers, 82,468 tons), with cargoes or part cargoes, and 101 steamers, 97,813 tons, in ballast; also 20 sailing vessels, measuring 6,043 tons, cleared with cargoes for French colonies, Portugal, Spain, Italy, &c.; and 24 sailing vessels in ballast, tonnage 26,343 tons, of which 15,465 tons cleared for Brazil,* and 9,096 tons for Chili.*

Of the French steamers, with cargoes and part cargoes, the principal clearances in the foreign trade were for the Argentine Republic (the exports of goods from Dunkirk have increased from 8,472 tons in 1888 to 17,587 tons in 1889): they generally call at Havre to complete cargo, and amounted in 1889 to 39 steamers, 84,812 tons, an increase of 26 steamers, 60,337 tons; Algeria, calling at other French ports en route, 58 steamers, 59,607 tons, increase 7 steamers, 10,406 tons; Germany, 19 steamers, 10,367 tons, increase 17 steamers, 9,428 tons, (chiefly owing to a line from Havre to Hamburg calling at Dunkirk); Spain, 10 steamers, 7,297 tons, decrease 5 steamers, 3,407 tons; also 4 steamers cleared for Senegal, 3 for England, 3 for Portugal, and 2 for Belgium. Cleared in ballast for England, 63 steamers, 61,470 tons; for Spain, 27 steamers, 25,266 tons; also 4 steamers for Belgium, 2 steamers for the Argentine Republic,* 2 steamers for Morocco, 1 steamer each for United States,* Japan,* and Germany.

There was a decrease in German tonnage of 9,082 tons, being 3,406 tons in sailing vessels, and 5,676 tons in steamers.

Swedish and Norwegian a decrease of 8,968 tons in sailing vessels, and an increase of 5,236 tons in steamers.

Italian a decrease of 12,515 tons in sailing vessels, and an increase of 1,007 tons in steamers.

Danish a decrease of 2,559 tons in sailing vessels, and 6,398 tons in steamers.

There were also decreases in United States, 4,503 tons; Dutch, 1,473 tons; Belgian, 688 tons; Russian, 590 tons; Greek, 4,114 tons; Portuguese, 980 tons; Austrian, 926 tons; and an increase in Spanish of 5,378 tons, and in Argentine 486 tons.

In my report for the year 1888, referring to the Cabotage Bill (navigation between France and Algeria), I gave some details respecting the carrying trade between France and her great colony. This carrying trade, as far as British and other foreign vessels are concerned, will most likely cease in 1892, owing to the probable denunciation by the French Government of the treaties of commerce which will then terminate in that year.

* Many of the vessels entered at customs as cleared for non-European countries in ballast went, I believe, to load cargoes at English ports for the countries for which they nominally cleared from Dunkirk in ballast.

The number and tonnage of British vessels entering Dunkirk with cargoes (chiefly barley) from Algeria during the last four years were as follows:—

Year.				Ships.		Tonnage.	
1886	..	..	..	20		12,996	
1887	..	..	..	24		16,368	
1888	..	..	..	19		15,648	
1889	..	..	..	23		18,304	

IMPORTS.

Proportion of
total imports
into France
entering by
Dunkirk.

Of the gross imports into France during the year 1889, the percentage entering by the port of Dunkirk was as follows:—
Wheat, 5 per cent.; barley, 55 per cent.; oats, 4 per cent.; rye, 58 per cent.; maize, 24 per cent.; wool, from the River Plate, 91 per cent.; jute, 36 per cent.; flax, 37 per cent.; cotton, 7 per cent.; oleaginous seeds, 31 per cent.; molasses, 34 per cent.; iron ore, 16 per cent.; zinc ore, 51 per cent.; pyrites, 69 per cent.; petroleum, 16 per cent.; mineral oil, 39 per cent.; nitrate of soda, 90 per cent.; and coal, 0·96 per cent.

RETURN of Principal Articles of Import to Dunkirk during the
Years 1888-89.

Articles.	1889.	1888.	From what Countries.
	Tons.	Tons.	
Linseed	60,852	59,164	India, Russia, Argentine Republic.
Mustard and rape ..	28,789	44,327	India, &c.
Other seeds	30,347	25,252	India, Russia, &c.
Rape and other cakes	17,881	19,108	England, Russia, Argentine Republic.
Ground nuts	14,403	16,373	Senegal, India, &c.
Wheat	74,051	167,196	United States, Roumania, Argentine Republic, &c.
Rye	10,165	23,087	Russia.
Barley	91,284	88,483	Russia, Algeria, Roumania, &c.
Oats	10,649	39,542	Russia.
Maize	126,644	68,798	Argentine Republic, United States, Roumania.
Rice	8,541	2,397	Japan.
Nitrate of soda ..	159,195	141,676	Chili.
Guano	355	827	Patagonia.
Flax	28,292	35,324	Russia.
Wool	87,820	65,753	Argentine Republic, Uruguay, &c.
Jute	17,166	14,282	India.
Cotton	10,966	8,371	Egypt, United States, India.
Molasses	28,964	63,036	Germany, Denmark.
Petroleum	31,362	20,988	United States, Russia.
Mineral oil	12,522	14,600	Russia, United States.
Coal	81,591	78,784	England.
Bitumen	14,832	5,225	"
Coal tar pitch ..	35,517	30,135	"
Lead	2,859	4,566	Spain, Argentine Republic.
Iron ore	258,090	193,587	Spain.
Zinc ores	18,085	17,204	"
Pyrates	26,969	22,355	Spain, Norway.
Pig iron	16,799	14,646	England.
Machinery	3,090	2,846	"
Bricks	2,740	3,794	"
Cement	2,395	1,982	"
Wood, sawn and unsawn	52,705	61,327	Sweden, Norway, Russia.
Other articles ..	114,510	120,022	
Total	1,470,460	1,475,052	

The above table includes all merchandise entering by sea, Imports, except 26 tons of salt from the French salt marshes, and the goods entering in the coasting trade, which amounted to 79,252 tons in 1888, and to 92,708 tons in 1889. Coasting trade.

There was a slight decrease in imports in 1889 compared with Imports, 1888, in which year, however, there was an increase of over 180,000 tons. The principal increases were in iron ore, maize, wool, nitrate of soda, and petroleum: and the principal decreases slight decrease. in wheat, oats, rye, molasses, and flax.

Imports of iron ore increased 64,503 tons; the ore is all taken by the iron and steel works in the Nord and the Pas de Calais. Iron ore increase.

The imports of maize were slightly superior to those of 1887, Maize but exceeded those of 1888 by 57,851 tons. Maize is very increase. largely used for distilling.

- Wool increase. Wool increased 22,067 tons; of the total import of 87,820 tons in 1889, upwards of 70,000 tons came from the River Plate, an increase of over 20,000 compared with 1888. The Dunkirk Chamber of Commerce ask for a "surtax d'entrepôt" to be imposed on Australian and Cape wool; they state that these wools are transhipped in London, and enter the north of France through Antwerp, Terneuzen, or Ghent, to the great detriment of French ports.
- Nitrate of soda increase. The immense imports of nitrate of soda into France through Dunkirk still continue, for the past year shows an increase of 17,519 tons. 90 per cent. of the total imports passed through Dunkirk.
- Petroleum increase. The explosion on board a petroleum tank steamer at Calais in October, 1888, will probably account for most of the increase in petroleum, as it was brought here in sailing vessels instead of going to Calais.
- Bitumen increase. Bitumen has increased 9,607 tons, and coal tar pitch 5,382 tons. I am told that a considerable quantity of the former import is sent to the Paris Gas Company, and that the latter is mixed with small coal to make briquettes.
- Wheat, oats, and rye decrease. Wheat decreased 93,145 tons, oats 28,893 tons, and rye 12,922 tons. These decreases were owing to the good harvest in France.
- Molasses decrease. Molasses fell from 63,036 tons in 1888 to 28,964 tons in 1889, chiefly on account of the very much larger imports of maize.
- Flax decrease. The imports of flax decreased 12,032 tons, but were still superior to those of 1885, 1886, and 1887.
- Coal. A small increase in the imports of coal, which were 81,591 tons against 78,784 tons in 1888. It is strange there was not a larger increase, for prices have been high during the last autumn and winter, house coal being at least 30 per cent. dearer than usual.

RETURN of Principal Articles of Export from Dunkirk during the
Years 1888-89.

Articles.	1889.	1888.	To what Countries.
	Tons.	Tons.	
Sugar	57,570	17,502	England, Italy.
Jute yarn.. ..	1,524	1,423	England.
„ sacks	533	300	England, Algeria.
Linen yarn	2,739	1,708	England.
Woollen „	50	41	„
Tissues „	974	750	„
Potash	3,293	3,437	„
Salt	4,828	6,166	Iceland Fishery.
Rails (steel)	17,282	15,447	Argentine Republic, Portugal, Spain, &c.
Slates	1,191	4,206	England, Germany.
Guano	..	1,157	„
Other manures	36,300	1,542	Germany, England, &c.
Natural phosphates	10,558	23,305	Germany, England.
Flour	3,128	3,136	England.
Barley	12	1,684	„
Flax	269	612	„
Oils	3,891	2,718	England, Holland, &c.
Glucose	1,195	1,361	England.
Dry vegetables	1,308	519	England, Algeria.
Green „	1,338	905	England.
Potatoes	399	379	England, Iceland Fishery, &c.
Fresh fruit	229	240	England.
Bottles	1,778	2,244	England, &c.
Casks	6,590	4,939	United States, England.
Forage, hay, and straw	14,230	20,268	England.
Bran	10,254	2,139	„
Coal	34,917	28,920	England, Algeria, Spain, Russia.
Other articles	65,886	51,830	.. ..
Total. . .	282,266	198,868	

Exports from Dunkirk in 1889 increased 83,398 tons; the Exports. principal increases were in sugar, manures, and bran, and the principal decreases in hay and straw.

The very large exports of sugar, 57,570 tons, compared with Sugar, large 17,502 tons in 1888, were owing to the extraordinarily large crop increase. in France, which enabled the French producers to undersell their German competitors.

Yarns increased 1,141 tons; they are chiefly sent to Great Yarns, Britain, jute yarns mostly going to Dundee. increase.

Steel rails shipped from Dunkirk amounted to 17,282 tons, an Steel rails, increase of 1,835 tons over 1888. Of these rails 5,766 tons were increase. exported to the Argentine Republic.

Manures, other than guano, show a large increase; these are Manures, chiefly superphosphate and phosphate of lime, which were classed increase. in the year 1888 with the natural phosphates. As I cannot obtain either the exact quantity of natural phosphates exported in 1888, or details respecting the quantities of superphosphate and phosphate of lime, I can only state generally that there has been a very considerable increase in the exports of manures, which are mostly sent to Great Britain and Germany.

Hay and
straw,
decrease.
Bran,
increase.
Vegetables,
increase.
Coasting
trade.

There was again a large decrease in the exports of hay and straw.

Bran, which was exported largely to Ireland, shows the large increase of 8,115 tons.

The exports of vegetables have increased; they are mostly sent to Great Britain.

A very large quantity of goods is taken from Dunkirk in the coasting trade (a trade reserved exclusively for French vessels). The quantity during the last three years amounted in 1887 to 200,841 tons, in 1888 to 198,243 tons, and in 1889 to 202,171 tons.

PORT OF DUNKIRK.

Harbour
works.

The construction of the new lock, which is to admit vessels drawing 34 feet to 35 feet, has, I regret to say, made little progress.

No addition was made during the past year to the dock accommodation, but some 200 yards of quay newly constructed on the east side of the Bassin de Commerce have been opened to shipping.

It is expected that darses Nos. 2, 3, and 4 (about 46 acres) of the Bassins Freycinet will be opened this year; they are already about half full of water.

Heaviest
draught vessel
entering dock
without
lightening.

The heaviest draught vessel that has ever entered dock without lightening was a steamer drawing 23 feet 6 inches, net register tonnage 2,317 tons. Vessels drawing 19 feet 6 inches can enter the Bassin Freycinet at high water neaps, and at low water springs the outer harbour is accessible to vessels drawing 8 feet.

Chamber of
Commerce
and the
commercial
treaties.

The Chamber of Commerce, in reply to the Government queries respecting the Treaties of Commerce, has asked to have them denounced for 1892, and has proposed:—(1) That a double tariff should be established, the first minimum to be accorded to those countries which will give corresponding advantages, the second maximum to be applicable to all others; (2) That the minimum tariff should not be granted to any nation for a longer period than three years.

It appears rather strange that the Chamber of Commerce, of a port which hopes to be the Liverpool of France, should propose a limit of three years' for commercial conventions.

BRITISH SEAMEN.

British
seamen.

In 1888 there was a very large increase in the number of seamen discharged at this port; an increase only slightly reduced in 1889, in which year 2,002 seamen were discharged, 1,384 engaged, and 31 reported as deserters—total 3,417—a decrease of 159 seamen compared with 1888.

Wages and
money orders.

The following table gives particulars of seamen discharged, wages paid, and money orders remitted to the United Kingdom during the past 10 years:—

Year.	Number of Seamen Discharged.	Wages Paid.		Money Orders Issued.	
		In Cash.	Bills on Owners.	Number.	Amount.
		£ s. d.	£ s. d.		£ s. d.
1880 ..	1,492	22,076 19 1	121 10 10	658	10,444 11 6
1881 ..	1,517	19,724 8 9	388 9 7	748	9,237 19 8
1882 ..	1,449	19,643 0 9	504 11 0	760	9,778 0 8
1883 ..	1,456	23,390 9 9	588 1 7	745	11,078 4 8
1884 ..	1,636	26,488 14 10	415 0 6	800	12,560 13 11
1885 ..	1,338	19,718 2 2	294 0 0	604	8,093 6 1
1886 ..	1,443	19,755 7 1	402 14 4	589	8,373 12 9
1887 ..	1,301	21,882 1 1	311 12 7	631	9,488 9 10
1888 ..	2,079	36,967 7 7	499 2 11	1,073	18,198 15 4
1889 ..	2,002	34,565 17 8	657 19 8	911	16,056 11 6

It will be seen by the above table that less than half the wages paid in cash is remitted by money orders. Why is this? Certainly not through ignorance of the money-order system on the part of the seaman. No, the reason is in the persuasive eloquence of the crimps, whose interest it is to prevent men taking orders at the Consulate, and who, in too many instances, unfortunately prevail.

Crimps prevent more orders being taken.

If the well-wisher of the seaman could get hold of him before the crimp, and give him the option of leaving at once, I believe large numbers would do so. Many a poor fellow robbed of his wages has said to me: "I know my weakness, but I can't help it; if drink is offered to me I must take it, and then I am lost." The only way to help such persons is to give them the opportunity of getting away from the paying-off port before the crimp can offer the temptation, and to send their money after them. It will be said by some people, but will not these men be the same in the United Kingdom? Yes, they may be if they do not go home to their friends; but when the money is sent to the home port there the seaman must go, and the majority of them have relations of some kind who will take care the money is not utterly lost, as it would have been in a foreign port; besides, taking a commercial view of the matter, is it not to the interest of British trade that the thousands of pounds now squandered in continental discharging ports should be preserved, if possible, for spending in the United Kingdom?

Means of preventing the robbery of seamen at foreign discharging ports.

It has been advocated, as a means of preventing robberies by crimps at ports of discharge, that it would be a good plan to let seamen have their wages either monthly or in every port, so that they could bank it, or send it home from time to time. For the seamen who would thus take care of their money it would be a useful system, but a large number would ask for money in order to spend it, and I believe it would thus add greatly to desertion. Very few men desert who have a large balance of wages due to them, as the fact of desertion entails forfeiture of wages; but, if wages were paid in every port, I am afraid the percentage of desertions would rise considerably.

Objection to seamen receiving their wages monthly or in every port.

"Midge"
system the
best remedy.

In my report for last year, I said the introduction of the "midge" system would be of great advantage to seamen at the large discharging ports between the Elbe and Brest. I am still of opinion that it would be the best means of preserving the wages of British seamen from being squandered in those ports.

Seamen's
railway
warrants.

Since July, 1888, this Consulate, under the sanction of the Board of Trade, has issued railway warrants exchangeable at Calais for through third-class tickets to London. During the year 1889, 298 of these warrants were issued.

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AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1889
ON THE
TRADE OF THE CONSULAR DISTRICT OF NANTES

REFERENCE TO PREVIOUS REPORT, Annual Series No 561

*Presented to both Houses of Parliament by Command of Her Majesty,
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FRANCE.

NANTES.

Consul Pauncefote to the Marquis of Salisbury.

My Lord,

Nantes, April 30, 1890.

IN subjoining my Report of the Trade and Commerce of Nantes for the Year 1889 I have the honour to annex the Report of Mr. Vice-Consul Warburton on La Rochelle, and also that of Mr. Link, the Consular Agent at Tonnay Charente.

A review of the commercial year 1889 indicates no improvement over the result attained in the previous year 1888. No signs of increased activity were exhibited in the general trade of Nantes; and the state of depression, or rather decline, which has prevailed for so many consecutive years, seems to point to the gradual extinction of some hitherto flourishing industries. Apart from a few, which may be considered as privileged, such as the manufacture of soap, sugar refinery, and oil pressing, and of a few special trades, for instance, the coal and the wine trade; all other branches of industry and commerce complain more or less of their actual position, which they attribute not only to foreign competition, but also to the French colonial tariff which admits foreign products on the same terms as French. Review of the year.

The expediency of renewing the existing commercial treaties, which will expire in two years, is now occupying the attention of the French Government, who have issued a circular to all the chambers of commerce in France embodying queries framed for the purpose of ascertaining the practical effect which the present fiscal system has had on the various branches of trade and industry in this country, and to elicit the general opinion of the commercial classes on the question of the renewal of the treaties as they now stand, together with any suggestions the chambers may have to offer regarding their modification and that of the general tariff. Renewal of commercial treaties.

The reply of the chamber of commerce at Nantes to the
(905)

numerous and specific questions of the French Government has been published for private circulation in the shape of a "brochure." Its perusal is not only instructive as a comprehensive review of the actual position of all the branches of trade in this district, but most interesting as it reflects the general feeling in this part of France, not only of the commercial, but of the influential agricultural classes on the subject, the consensus of opinion being for a policy of uncompromising protection. To translate and set forth the detailed information and the various arguments embodied in this pamphlet would take up too much space, and, I may add, time, for it was only quite recently that I procured a copy of it.

Summary

The existing treaties are denounced on the ground that they no longer meet the present requirements of trade. Commercial treaties for extended periods are objected to, for in these days of progress and science and of fresh discoveries, certain French industries might suddenly be placed in a position in which they could not hold their own against foreign competition. For this and other reasons preference is given to treaties not exceeding a period of 10 years, the contracting states having the reciprocal power to annul them at the expiration of the fourth and the eighth year by a previous notice of one year.

As a *sine qua non* condition such treaties should be framed so as to amply provide for the protection of French industries, and the general tariff modified on the same principle, and enforced in all French colonies. The chamber, however, are aware that protection to one industry may prove detrimental to another, and suggest that the duties to be levied on particular articles should be settled by a special committee.

Raw materials.

Any fresh duty on raw materials is deprecated for it would necessitate an increase of duty on all goods manufactured out of similar products. Throughout the report there underlies a current of feeling in favour of a highly protected tariff; but after a full consideration of the question in all its aspects, the chamber are of opinion that protection to be efficacious must not go beyond the limits of moderation, otherwise it might lead to retaliation, which would be especially injurious to the export trade of France.

Turning from this subject, I beg to append the returns of shipping and of the imports and exports of Nantes.

Shipping.

The total number of vessels of all nationalities which entered this port in 1889 amounted to 330, and those that cleared to 367, total 697, with an aggregate of 185,305 tons. In 1888 the vessels which entered and cleared amounted to 657 with a total tonnage of 172,476; showing in 1889 an increase of 40 in the number of vessels and of 12,829 tons.

As regards British vessels, the total number which entered and cleared amounted to 173, with an aggregate tonnage of 58,933, an increase over the preceding year of 16 in the number of vessels and of 5,411 tons. Of the total number of British vessels which entered and cleared, 100 were engaged in the direct trade with Great Britain and her colonies, and 73 in the indirect trade with other countries.

The principal articles of import and export of Nantes will be found in table B., with a comparison both as regards quantity and value with the preceding year. Imports and exports.

As regards the volume of the imports and exports, in 1888 they amounted to 195,828 tons, and in wines and spirits to 2,623,067 gallons. In 1889 to 110,490 tons and 3,045,174 gallons. A decrease of 85,338 tons, but an increase of 422,107 gallons.

Table C. gives the total value of all the imports and exports. It shows an increase in 1889 of 575,710*l*.

The shipbuilding yards of the Loire were more active than the preceding year, 1888; but the position of the trade is far from satisfactory. For some years past it has been in a state of stagnation, so that contracts were sometimes made on unremunerative terms to prevent orders being given out in England. Those engaged in the trade seem conscious of their inability to compete with British shipbuilding yards, which, possessing the advantage of constant orders, are enabled to afford a better plant, and to keep together a selected staff of workmen. Increased protection is therefore demanded, and the abolition of the half bounty granted to vessels purchased in England. Shipbuilding.

The trade in sardines, a well known "spécialité" of Nantes, continues prosperous. In my last report for the year 1888, I reported the unexpected reappearance of these fish in enormous shoals, thus dispelling the fears entertained that they had deserted for good the coasts of France. The scarcity of the fish a few years back led certain packing firms to establish branch houses in Spain and Portugal, and complaints are now raised by the trade here of the export of sardines from those countries, even to France, under cover of French labels. It is worthy of notice that those engaged in the trade have observed that sardines appear for three or four consecutive years, and then become scarce for a certain period. Sardines.

In a separate report on agriculture in this district for the year 1889, I bring to notice the opening in this country for British manufacturers of artificial manures, and of agricultural machines and implements. Agricultural implements and manures.

After the authoritative opinion of the chamber of commerce of Nantes on the actual position of the general trade in this district which is summarised above, it would be superfluous to enter into further details on the subject. That the year 1889 was an unfavorable one is indicated by the receipts of the customs:—

			Fr.	c.
In 1888 they amounted to	..	..	25,766,554	00
„ 1889 „ „	..	..	21,136,774	10
A decrease of	..	..	4,629,779	90

In my last report I gave some detailed information regarding the ship canal in construction between Nantes and St. Nazaire, which it is anticipated will greatly develop the trade of this port. The necessary funds for its completion having been subscribed, Canal of the Basse Loire.

the work has been progressing steadily, and is expected to be accomplished in the course of next year.

Health.

Nantes did not escape the epidemic of influenza, but fortunately it appeared in a mild form. It attacked principally adults of 35 years of age and upwards, and persons in a weak state of health. With this exception the general health remained good.

New system
of filtration.

In my report for the year 1888, I alluded to the polluted water supplied to this town. This matter has been under the earnest consideration of the local authorities, and experiments were made under the plans and supervision of the chief engineer here, to ascertain whether it is practicable by means of natural filtration through sand to obtain from the Loire a sufficient quantity of water of good quality to meet the requirements of the public. These experiments, witnessed by a number of the leading townsmen, were most satisfactory, both as regards the quantity and quality of the water, the latter being pronounced to be as clear and limpid as any passed through Pasteur's filter, with the advantage of being more lively or aerated. The chief engineer's report has not yet been published, and I can, therefore, give only a rough and imperfect description of his process, and of the experiments which he superintended.

At a certain distance up the river and above the town an artificial islet of sand was constructed in the middle of the river on a bed of sand. Through this mass of sand, a well was sunk to a certain depth into the bed of the river. This well is built of stonework and water-tight, with ranges of "barbacans," or apertures, filled with small stones, to stop the ingress of filth. These apertures can be closed, more or less at will, by means of valves, so as to prevent the water when the river overflows from forcing its way too rapidly into the well. The islet of sand is protected from destruction by the waters by a "revêtement" of loose stones. The water filtered through the sand fills the well, and is pumped out by steam power. It is estimated that 10 of these wells sunk in quincunx would supply all the requirements of Nantes. This system of filtration is now under the consideration of the municipality; but I mention the successful result of the experiments of the chief engineer, as it is a matter which may be interesting to water companies in England. This system is not costly, and might, perhaps, be adopted with great advantage in India.

Population.

A fresh census of the population will be taken next year. According to the last returns, in 1886, it amounted then to 127,482.

St. Nazaire.

Shipping.

I have the honour to append the returns of the shipping and of the imports and exports at St. Nazaire, made out by Mr. Vice-Consul Dickie. The number of vessels of all nationalities which entered in 1889 amounted to 1,392, and those which cleared to 1,418, a total of 2,810; with an aggregate tonnage of 1,466,387. In 1888, the total number of vessels which entered and cleared numbered 1,611, with an aggregate tonnage of 1,096,354. A comparison shows an increase in 1889 of 1,199 in the number of

vessels, and of 370,033 tons. The number of British vessels which entered were 523, and those which cleared 525, a total of 1,048; measuring 723,533 tons. Of the 1,048 vessels, 572 were engaged in the direct trade with Great Britain and her colonies, and 476 in the trade with other countries.

The particulars of the imports and exports are set forth in form B. As regards quantity, they amounted in 1889 to 885,504 tons, and 2,242,398 gallons. In 1888 to 809,784 tons, and 1,391,532 gallons, showing an increase in 1889 of 75,720 tons, and 850,866 gallons. Imports and exports.

The value of the imports and exports not having yet been ascertained, I am unable to transmit form C.

The well known iron works at Trignac, near St. Nazaire, which some time back had been compelled to go into liquidation, have resumed work on the strength of numerous and important orders from the Compagnie des Chantiers de la Loire, and from the Transatlantic Company. The Société Générale Transatlantique have quite recently launched a very fine steamer, but I am unable at present to give its dimensions. Iron works at Trignac.

The population of St. Nazaire amounted to 24,204, according to the returns of 1886. Population.

The rapid expansion of St. Nazaire as a port is entirely due to its splendid docks. In my report for 1888, I remarked on the relative position, in a commercial point of view, of the ports of Nantes and St. Nazaire, and pointed out that the great bulk of the business done at the latter port is carried on for the account of merchants residing at Nantes.

In addition to the information contained in this report, I can find no subject of special importance to British trade to bring to your Lordship's notice.

I have, &c.
(Signed) B. PAUNCEFOTE.

Annex A.—RETURN of all Shipping at the Port of Nantes in 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	9	2,125	78	27,523	87	29,648
French ...	153	26,191	9	1,522	162	27,713
Swedish and Norwegian ...	24	6,795	17	6,225	41	13,020
German ...	10	2,891	5	2,426	15	5,317
Danish ...	4	919	2	1,048	6	1,967
Other countries ...	8	2,315	11	4,143	19	6,458
Total ...	208	41,236	122	42,887	330	84,123
„ for the preceding year	207	39,236	103	38,200	310	77,436

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	9	2,125	77	27,160	86	29,285
French ...	156	30,513	20	5,949	176	36,467
Swedish ...	30	7,958	22	8,353	52	16,311
German ...	9	2,794	5	2,544	14	5,338
Danish ...	4	919	3	1,481	7	2,400
Other countries ...	7	2,089	25	9,312	32	11,381
Total ...	215	56,383	152	54,799	367	101,182
" for the preceding year	203	40,859	144	54,131	347	94,990

Annex B.—RETURN of Principal Articles of Export from Nantes during the Years 1889–88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Wines and spirits ...	Gallons ...	177,760	£ 13,374	129,879	£ 14,536
Cereals and flour ...	Tons cwts. ...	3,868 11	56,448	3,252 2	28,864
Preserved provisions ...	" ...	321 12	47,629	441 11	32,969
Hardware, rails, &c. ...	" ...	995 6	61,048	1,415 4	61,666
Coal ...	" ...	3,686 11	4,424	7,735 13	4,104
Oil-cake ...	" ...	459 4	4,163	558 7	2,691
Cast-iron ...	" ...	151 9	2,506	438 18	5,842
Building materials ...	" ...	5,425 17	51,257	8,623 18	5,420
Other articles ...	" ...	12,980 8	311,164	20,670 19	255,217
Total ...	{ Gallons ... Tons cwts. ...	{ 177,760 27,888 18 }	{ 558,003 }	{ 129,879 43,336 12 }	{ 412,309 }

RETURN of Principal Articles of Import to Nantes during the Years 1889–88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Wines and spirits ...	Gallons ...	2,867,414	£ 120,080	2,493,188	£ 166,316
Sugar, raw and refined ...	Tons cwts. ...	18,939 17	560,694	39,432 17	514,843
Iron, steel, and ore ...	" ...	4,120 4	138,531	15,421 5	59,065
Other metals ...	" ...	760 2	71,363	2,157 13	68,455
Coal ...	" ...	10,776 8	13,231	18,514 5	9,971
Timber ...	" ...	16,757 7	107,312	29,221 4	8,821
Coffee ...	" ...	464 12	72,109	842 11	71,160
Cocoa ...	" ...	899 15	125,247	3,938 1	296,133
Cereals, seed and flour ...	" ...	1,124 8	17,097	2,206 5	21,496
Combed hemp ...	" ...	420 12	25,969	2,510 6	100,294
Animal charcoal ...	" ...	987 18	8,691	608 16	63,789
Olive oil ...	" ...	983 0	85,718	1,432 8	69,498
Other articles ...	" ...	26,368 16	759,421	35,154 4	215,605
Total ...	{ Gallons ... Tons cwts. ...	{ 2,867,414 } { 82,602 19 }	{ 2,105,463 }	{ 2,493,188 } { 162,491 15 }	{ 1,675,446 }

Annex C.—TABLE showing the Total Value of Articles Exported from Nantes and Imported to Nantes from and to Foreign Countries during the Years 1889-88.

		Exports.		Imports.	
		1889.	1888.	1889.	1888.
		£	£	£	£
Total value	.. ..	558,003	412,309	2,105,463	1,675,447

Annex A.—RETURN of all Shipping at the Port of St. Nazaire in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	19	9,271	504	357,026	523	366,297
French	272	33,436	552	308,774	824	344,210
Swedish	11	1,440	14	5,040	18	6,480
German	4	1,880	6	3,240	10	5,120
Danish	1	640	1	1,061	2	1,601
Other countries ...	6	4,492	9	5,528	15	10,316
Total	313	49,059	1,086	680,669	1,392	734,024
“ for preceding year ...	90	41,983	713	505,456	803	547,439

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	18	8,780	507	348,456	525	357,236
French	285	169,039	564	193,087	849	362,126
Swedish	9	3,780	10	4,200	19	7,980
German	4	1,883	6	3,240	10	5,120
Danish	1	640	1	1,061	2	1,601
Other countries ...	4	3,772	9	5,528	13	9,300
Total	321	177,794	1,097	555,572	1,418	732,363
“ for preceding year ...	99	43,276	709	505,639	808	548,915

Annex B.—RETURN of Principal Articles of Export from St. Nazaire during the Years 1889–88.

Articles.					Quantity.	
					1889.	1888.
Eggs and poultry	Tons	..	..	..	6,803	5,312
Sardines.. .. .	"	..	..	..	2,878	1,968
Salted butter	"	..	..	..	2,951	2,773
Preserved meat.. .. .	"	..	..	..	262	741
Bone dust	"	..	..	..	980	628
Grain and flour.. .. .	"	..	..	..	4,324	3,689
Potatoes.. .. .	"	..	..	..	1,920	1,487
Dried vegetables	"	..	..	..	561	322
Timber	"	..	..	..	3,124	130
Prepared dyes	"	..	..	..	2,534	1,239
Clothing, ready-made	"	..	..	..	118	144
Paper	"	..	..	..	917	747
Machinery	"	..	..	..	348	498
Tools	"	..	..	..	212	123
Coffee	"	..	..	..	301	332
Hardware	"	..	..	..	181	238
Glass	"	..	..	..	2,449	1,820
Leather	"	..	..	..	464	132
Iron bars and rails	"	..	..	..	135	836
Steel rails	"	..	..	..	106	518
Other goods	"	..	..	..	78,817	84,937
Vegetables	"	..	..	..	969	589
Toys	"	..	..	..	267	141
Wine, ordinary	Gallons	..	..	..	713,131	644,838
Brandy	"	..	..	..	102,297	86,378
Total	Tons	..	..	..	111,621	109,304
"	Gallons	..	..	..	815,428	731,216

Annex B.—RETURN of Principal Articles of Import to St.
Nazaire during the Years 1889–88.

Articles.		Quantity.	
		1889.	1888.
Coal	Tons ..	626,421	576,412
Cereals	" ..	30,366	32,549
Manure	" ..	14,738	8,060
Rice	" ..	..	7,706
Sesame seed	" ..	4,460	1,338
Timber	" ..	18,664	20,594
Cement	" ..	1,801	1,861
Iron ore	" ..	15,081	17,611
Tar	" ..	85,414	7,627
Bar iron	" ..	310	526
Pig "	" ..	675	798
Lead	" ..	4,734	3,491
Raw cotton	" ..	66	83
Coffee	" ..	395	457
Oils	" ..	130	114
Hemp	" ..	172	129
Machinery	" ..	447	255
Other goods	" ..	20,009	21,049
Wine, ordinary	Gallons ..	1,426,970	660,316
Total	Tons ..	773,883	700,480
"	Gallons ..	1,426,970	660,316

LA ROCHELLE.

Mr. Vice-Consul Warburton reports as follows:—

The returns of exports and imports from the custom-house at La Rochelle for the year 1889 show no signs of a revival in the trade of this district.

The exports have slightly increased, being 732 tons more than in 1888, but the imports show a continued decrease of 18,000 tons, or over 9 per cent.

The most unfavourable feature in this return from a British point of view is, that the whole of this decrease is accounted for by a falling-off in the quantity of coal from Great Britain, which is less by 25,000 tons, and I am afraid that the increased cost of ours is to a great extent the cause of it, though the full effect of the higher prices will only be felt later.

The rise in freights in the beginning of last year added something (though not much) to the cost, but since the colliery and other strikes the increase has been continuous, and I am informed that merchants are withdrawing their orders, and consider the point to have been reached at which railway-borne French coal will have to be substituted for English.

The railway companies of France seeing their opportunity are making great efforts to obtain this large carrying trade by reducing their rates, and will probably do so to a still greater extent in future. Some time ago this would have been useless,

Falling off in imports of coal from the United Kingdom.

because, although the difference of price between English and French coal was not very large, the superiority of ours was so great that no reduction they could have made in rates would have brought them together, but circumstances have now entirely changed.

A year ago Welsh coal at La Rochelle with freight and duty came to about 14s. per ton, against the same or a trifle more for French. Now, in the beginning of March, 1890, Welsh has risen to 22s., while French has scarcely altered. With such a difference it would seem that the substitution of one for the other is inevitable, and can only be a question of time, unless the same causes which have increased the cost of the foreign should do the same with native coal, but at present there is nothing to indicate this, as the strikes in this country have not hitherto been general, and where they have occurred the demands of the miners appear to have been moderate, and even the increased rates of payment obtained leave wages at what (considering the number of hours they are willing to work) we should consider very low in England.

Salted fish.

It will be seen from the accompanying returns that a considerable amount of salted fish is annually imported to La Rochelle.

The whole of it is cod fish from the Newfoundland and Iceland fisheries, and last year the quantity was 1,800 tons. The vessels engaged in this fishery do not belong to La Rochelle, but to St. Malo and other places in Brittany. They seldom return to their own ports with their catch, as the fish is not saleable until it has been dried, and the sun is not hot enough for this so far north; the ships, therefore, run down to this and other southern ports where the process of drying is carried out, the fish selected according to size (for some markets require them large and others small or medium size, according to the taste which prevails in the different districts), and distributed through this and other countries, Spain and Italy taking a great part of it.

It is a very popular article of food in this and central France, and is really good when properly steeped to take the salt out, but by no means a cheap one, as last year the retail price was not much below that of beef. Wholesale it sells much lower, the cost here being under 2½d. per lb., and a bounty of 8l. per ton is allowed by the State on any exported.

It is stated to be superior to the produce of our own fisheries, and, if so, it might be well worth exporting to England, as the bounty alone would give a handsome profit on the transaction.

Wine imports.

There is nothing to call for notice in the other exports and imports except the curious circumstance that, in a so-called wine producing country, 15,340 tons of wine were imported into La Rochelle last year, against 4 tons exported.

Shipping and navigation.

British shipping has held its own very well during the past year, being within 1,500 tons of what it was in 1888, while French has lost 15,000 tons in the same period.

I am afraid, however, that we cannot expect this proportion

to be maintained in future, as competition is likely to become keener; new steamers with all modern improvements are being built in England for shipowners here, which will have great advantages in competing with ours.

Wages are now very low compared with those paid to British seamen, and every increase the latter get makes the difference greater, as they are not rising in the same proportion here. There must be some point at which these reductions in expenses will produce their effect, and the wonder is that it has not been reached long ago.

Probably the reason why French vessels at La Rochelle are not taking the place of English to a greater extent is that there are not enough of them to ensure that they can be had with any certainty when required, but as new ones are purchased this difficulty will disappear, and some of the charters of British vessels last year were certainly due to the fact that the steamers belonging to this port were fully employed elsewhere.

There is no change in the navigation of the port since my last report, and the largest British vessel which entered with cargo was one of 1,039 tons register, with 2,000 tons of coals from Cardiff.

The new port of La Pallice will probably supersede it entirely in the course of time, as it will be accessible at all times and to vessels of the largest tonnage.

Freights have fallen again, the rate for coals from Wales is now only 4s. 5d., against 5s. last year. Freights.

There are no complaints about brokerage, which is most satisfactorily conducted at this port, and the charges are moderate. Brokerage.

Having already sent in a separate report on agriculture I have nothing further to say on this subject, except that the prospects are better than for some time past owing to a considerable increase in the price of stock, which, if it lasts, will help to make up for the low prices of corn, but at the same time those who are interested in land do not look with much hope for any great improvement, except from the imposition of protective duties, and the employment of a portion of the revenue thus obtained in reducing the taxes which press on it. Agriculture and protective duties.

They profess to think that the duties can be raised to such an extent as to render farming profitable, without increasing the price of food to the public, and they say that this can be done by forming co-operative societies to sell at reduced prices to the consumer, and thus doing away with the retail dealers' profits, but they do not explain what they intend to do with the large class which live by this trade, and who are naturally not favourable to this way of settling matters.

To the objection that other industries will also claim to have the same protection, they reply that there is not likely to be the same necessity for it, because they will share in the general prosperity resulting from the increased spending power of the agricultural and landed class, and that (except in some few cases)

there has not been the same demand for it, and they have shown themselves on the whole moderate and reasonable hitherto.

Certainly there has not been the same agitation on the part of the other industries, as in the case of those who live by land, but this is more owing to the fact that they are less powerful and united, and also perfectly able to see that once the principle is established, it will be very difficult to limit it.

How safe it is to trust to the patriotism and moderation of persons when their interests are concerned, is illustrated by a rather amusing incident which occurred the other day at a sea-port town in this part of the world.

It appears that, owing to the increased price of English coal, and the reduction the French companies are making in rates, native coal has been coming in by rail, instead of foreign by sea. One would suppose that this was about the best thing that could happen for the general prosperity of the country, but it seems that the interests of this port depend on the number of vessels trading to it, and accordingly a petition was got up to Government, and sent round for signature, asking that pressure should be brought to bear on the railway companies to prevent them from reducing their rates, so that foreign coal may continue to arrive by sea, instead of French by land.

We can form a pretty good idea from this of how far moderate demands are likely to prevail when the ball of protection has once been set rolling.

Agricultural
implements.

In my report on agriculture I called attention to the great demand for English agricultural machines, and the splendid prospects opening to this branch of trade here a few months ago.

Since then the strikes in England have changed everything. The makers have written to say that owing to the increase of wages they can no longer sell at the same prices, and the Americans have taken the opportunity to make a considerable reduction in their machines, which are equally good. The result can only be disastrous to our manufacturers, as the American price is now so much lower than the English that if it continues so all competition between the two will be at an end.

The co-operative society has just got over one hundred mowers and reapers, which it will probably have to sell at a loss, as the American agents are offering as good ones at a reduction of 10 per cent., and all the large orders about to be sent to England will have to be diverted to America for the present, although the French makers are working hard, and not unlikely to be able, by and bye, to get a share in this business, which we have nearly succeeded in getting rid of, though six months ago it seemed impossible for anyone to take it from us.

Consigning of
English
goods for sale.

In my last report I mentioned that the Americans had adopted the system of consigning goods for sale here, and suggested that our manufacturers might do business in the same way by using the co-operative society as agents, but nothing has come of it. One or two firms did write to the society, which agreed to act for them, and selected patterns likely to suit the

market here, but when it came to sending them over, the manufacturers would not do so unless the society consented to buy them outright, which was declined, and the matter came to an end.

The houses in question seem to be of opinion that they were conferring the favour by sending to the society, while the latter considered the obligation to be the other way, as they have plenty of firms at home only too glad to do so.

The new port of La Pallice is nearly completed, and will be formally opened in August next. Public works.

The railway connecting it with the central station at La Rochelle is being made, but will not be ready in time for the opening of the port, where much will have to be done in the way of putting up steam cranes and other facilities for discharging cargo before it will be available for heavy traffic. I am informed, however, that it will be used at an early period by some of the transatlantic lines for taking up mails and passengers, and two of these ocean companies have already secured landing stages.

A glance at the map will show how great a saving of time will be made by touching here, instead of at certain other ports which are now used by large vessels running between France and America.

La Rochelle was visited by an epidemic of Russian influenza in November, which lasted for about two months. Public Health.

It is difficult to ascertain the number of cases, but probably about 4,000 persons were attacked out of a population of 23,000. There were very few (if any) deaths directly caused by it, but several occurred from lung or other affections following on it.

There was no epidemic amongst the lower animals accompanying it, and cattle and all live stock were particularly free from illness in 1889.

RETURN of Principal Articles of Export from La Rochelle in the Years 1889-88.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	Values cannot be ascertained.	Tons.	£
Spirits	96		4	..
Wine	4		219	..
Empty casks	1,840		1,441	..
Salted fish	270		584	..
Other articles	8,774		..	..
Total	10,984	..	10,252	..

RETURN of Principal Articles of Import to La Rochelle in the
Years 1889-88.

Article.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coals	149,378	135,000	173,382	140,000
Wood	8,268	..	12,249	..
Iron ore.. ..	1,364	..	1,450	..
Pitch and tar	5,733	15,000	3,140	22,000
Cement.. ..	406	1,600	179	600
Wine	15,340	..	11,481	..
Spirits	242	..	6	..
Salted fish	1,845	..	1,828	..
Other articles	7,345	..	..	..
Total	189,921	..	203,631	..

The ton is calculated at 1,015 kilos., and the li. at 25 fr.

RETURN of all Shipping at the Port of La Rochelle in the
Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	349	67	40,608	68	40,957
French... ..	44	6,096	107	57,189	151	63,285
Swedish and Norwegian	22	8,617	6	2,522	28	11,139
Other countries	3	909	3	2,249	6	3,158
Total	70	15,971	183	102,768	253	118,739
„ for preceding year ..	72	19,223	183	115,052	255	134,275

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	349	67	40,608	68	40,957
French... ..	95	9,466	44	48,684	139	58,150
Swedish and Norwegian	23	8,846	6	2,423	29	11,269
Other countries	3	998	1	499	4	1,497
Total	122	19,659	118	92,214	240	111,873
„ for preceding year ..	78	19,963	161	107,461	239	127,444

TONNAY CHARENTE.

Mr. Consular-Agent Link reports as follows :—

Business during the year 1889 has been very satisfactory in my Consular district both in imports and exports, exceeding those of the year 1888 considerably. (Annex B.)

319 vessels from oversea entered the ports of Tonnay Shipping. Charente and Rochefort during the year, measuring together 170,920 tons, of which 205 were British, viz., 5 sailing vessels and 200 steamers, measuring together 114,619 tons, showing an increase during the year of 9 British vessels, and of 11,345 tons measurement.

The sailings were 309 vessels, measuring 170,149 tons, of which 204 vessels were British, viz., 5 sailers and 199 steamers, measuring 114,550 tons, an increase of 9 vessels and 10,953 tons. (Annex A.)

The coasting and fluvial navigation during the year consisted of 2,244 vessels and craft, measuring 150,408 tons inwards, and of 2,202 vessels outwards, measuring 145,260 tons.

Coal freights from the Bristol Channel kept remunerative Freights. during the year; they varied from $7\frac{1}{2}$ fr. to 8 fr. per ton, the same as in the preceding year.

Wood freights from the Baltic have been somewhat firmer than those in 1888.

Coal and fuel, the principal articles imported, were 169,800 Imports. tons, being in excess by 6,900 tons over that of the year 1888.

						Tons.
Coal-tar pitch	..	..	..	..	..	5,200
Pig-iron	..	..	..	..	..	500
Phospho guano	..	..	..	..	..	5,570
China clay	..	..	..	..	..	700
Cement	..	..	..	..	..	160
Pyrites of iron	..	..	..	..	..	700
Oak staves	..	..	..	..	..	1,280
Divers goods	..	..	..	..	..	400

Timber and deal, 52,100 loads, of 50 cubic feet; wheat, oats and barley, 73,225 quarters.

This article of British manufacture is fast disappearing in this Cement. district; the French cement, much cheaper, but certainly of inferior quality, is now generally employed instead.

Brandy, our chief export produce, has amounted during the Exports. year to 34,180 tons, or 4,875,250 gallons, exceeding that of 1888 by 54,856 gallons; it consisted of—76 vats; 830 puncheons; 20,321 hogsheads; 46,030 quarter casks; 6,734 octaves; and 656,564 cases. The price of this produce has been somewhat higher than in the year 1888.

The Transatlantic Company, a French line, are running small steamers weekly from La Rochelle to Newhaven, via St. Nazaire, taking goods to the United Kingdom at a lower rate than that of our old established British lines. They have succeeded in getting a small portion of the Charente brandies destined for home consumption, principally those for the metropolis, owing to the exorbitant dock charges there which our direct steamers have to bear, but it is anticipated that the British flag will be enabled to compete successfully with this opposition.

The other goods exported were :—

Articles.					Quantity.	
Wine	..	..	..	..	Gallons ..	27,400
Clover-seed	..	..	..	..	Tons ..	420
Oysters	..	..	..	..	" ..	398
Apples	..	..	..	..	" ..	314
Hay, hydraulic pressed	..	..	..	..	" ..	602
Straw bottle envelopes.. .. .	..	..	..	..	Gross ..	2,920
Paper	..	..	..	..	Tons ..	192
Building stone	..	..	..	..	" ..	750
Pitwood	..	..	..	..	" ..	5,935
Sundry other goods	..	..	..	..	" ..	150

Public works. A new line of railway has been opened from Marennes to Rochefort, passing through Tonnay Charente, communicating direct with the Upper Charente, la Vendée, and the Deux Sèvres and Paris, opening out a large traffic consisting of salt, oysters, fish, and artificial manures, which formerly were exported exclusively by water.

A new dock will be opened for traffic in the course of the year 1890 at Rochefort; it will admit ships of heavy draft on neap tides. In my next report I will give a detailed description of its size, and the facilities which it will possess for the unloading of vessels.

Health. The sanitary conditions of this district have been throughout the whole year in a perfect satisfactory state.

Annex A.—RETURN of all Shipping at the Ports of Tonnay Charente and Rochefort in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	5	649	200	113,970	205	114,619
French	31	2,395	29	28,505	55	31,400
Norwegian	30	13,759	4	1,876	34	15,635
Swedish	2	618	2	1,218	4	1,736
Danish	...	...	3	2,768	3	2,768
German	4	1,487	2	1,068	6	2,555
Other nationalities	3	486	4	2,221	7	2,707
Total	75	19,294	244	151,626	319	170,920

NANTES.

17

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	5	649	199	113,901	204	114,550
French	22	1,693	29	28,505	51	30,198
Norwegian	30	18,759	4	1,876	34	16,635
Swedish	2	518	2	1,218	4	1,736
German	...	...	3	2,768	3	2,768
Danish	4	1,487	2	1,088	6	2,555
Other nationalities	3	486	4	2,221	7	2,707
Total	66	18,592	243	151,557	309	170,149

Annex B.—RETURN of the Principal Articles of Export from
Tonnay Charente and Rochefort during the Years 1889–88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Brandy	Gallons ...	4,875,250	£ 2,392,600	4,820,394	£ 2,192,500
	or Tons ...	34,180	...	31,775	...
Other articles	Tons ...	9,065	40,500	6,900	27,700
Total	...	43,245	2,433,100	88,675	2,220,200

RETURN of the Principal Articles Imported to Tonnay Charente
and Rochefort during the Years 1889–88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Coal and fuel	Tons ...	169,800	£ 149,000	162,900	£ 122,200
Coal-tar pitch	" ...	5,220	10,400	3,500	6,600
Phospho manure	" ...	5,870	28,300	6,480	31,000
Timber and deals	Loads ...	52,100	not ascertained	60,380	not ascertained
Cereals	Quarters ...	73,300	118,300	73,480	113,010
Other articles	Tons ...	3,800	not ascertained	3,150	not ascertained

Annex C.—TABLE showing the Total Value of all Articles Exported from Tonnay Charente and Rochefort, and Imported to Tonnay Charente and Rochefort during the Years 1889–88.

Country.	Exports.		Imports.	
	1889.	1888.	1889.	1888.
	£	£	£	£
United Kingdom and Colonies	2,783,000	2,220,200	191,050	176,230
Belgium	..	..	2,000	..
Spain	350	300	750	700
Roumania	..	..	not ascertained	8,000
United States	..	..	276,500	52,100
Norway	..	..	not ascertained	not ascertained
Sweden	..	..	..	..
Germany	..	..	..	..
Total	2,783,350	2,220,500	..	..

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641. Venice	1d.	704. Kewkiang	4d.
642. Cherbourg	½d.	705. Fiume	1d.
643. New York	1d.	706. Odessa	2d.
644. Patras	1d.	707. Suakin	½d.
645. Bourgas	½d.	708. Hankow	½d.
646. St. Petersburg	3d.	709. Amoy	1d.
647. Taganrog	½d.	710. Buda-Pesth	1½d.
648. Baltimore	1½d.	711. Corunna	2d.
649. New Orleans	2d.	712. Mogador	2d.
650. New Orleans	1d.	713. Cadiz	½d.
651. Samos	½d.	714. Cadiz	1d.
652. Buda-Pesth	1½d.	715. Rio de Janeiro	2½d.
653. Tripoli	½d.	716. Newchwang	½d.
654. Buenos Ayres	½d.	717. Chinkiang	½d.
655. Paris	1d.	718. San Francisco	6d.
656. Cherbourg	1d.	719. Bussorah	½d.
657. Warsaw	½d.	720. Beyrout	1d.
658. Rome	1½d.	721. Adrianople	½d.
659. Saigon	½d.	722. Nantes	½d.
660. Buenos Ayres	½d.	723. Caracas	1d.
661. Galveston	1d.	724. Mogador	½d.
662. Galatz	1½d.	725. Tientsin	1d.
663. Antwerp	1d.	726. Foochow	1d.
664. Boston	1d.	727. Port au Prince	½d.
665. Madeira	½d.	728. Callao	1d.
666. New Hebrides	½d.	729. Puerto Plata	½d.
667. Riga	1d.	730. San Francisco	1d.
668. Charleston	1d.	731. Philadelphia	2½d.
669. Algiers	2d.	732. Pakhoi	1d.
670. Stuttgart	1d.	733. Bilbao	1d.
671. Havre	3d.	734. Dunkirk	1d.
672. The Piræus	1d.	735. Vienna	1d.
673. Syra	1d.	736. Nantes	1½d.
674. Boulogne	1d.	737. Paramaribo	1d.
675. Taganrog	2d.	738. Honolulu	½d.
676. Wuhu	½d.	739. Chicago	2d.
677. Batoum	1d.	740. Soul	1d.
678. Manila	1d.	741. Brindisi	1½d.
679. Tamsui	1d.	742. Mozambique	1d.
680. Kiungchow	1d.	743. Caldera and Lota	1½d.

No. 744.

Reference to previous Report, Annual Series No. 550.

FRANCE.

NICE.

Consul Harris to the Marquis of Salisbury.

My Lord, Nice, May 13, 1890.

I HAVE the honour to enclose my Report on the Trade of my District during the year 1889. The illness of Mr. Vice-Consul Gurney, which I am sorry to say still continues, and the consequent pressure of work thrown upon myself, as well as the difficulty certain of the Vice-Consuls have experienced in obtaining the necessary statistics, have greatly delayed me this year.

I have, &c.

(Signed) J. C. HARRIS.

Report on the Trade and Commerce of Nice.

In my report for the year 1888 I stated that the works of the harbour of Nice were practically concluded save as regarded the western quay. Since then this quay also has been completed; and the new basin is now an integral and a very handsome portion of the harbour; its beautiful blue waters fed by several pure springs, and its truly noble cut-stone quays forming a great and increasing attraction to the finest steam yachts afloat. Unfortunately the channel at the entrance has not been deepened at the same time as the harbour has been enlarged, and a case has occurred in which a British steamer drawing over 21 feet of water has been obliged to lighten itself by discharging a portion of its cargo into lighters at Villefranche, before it could enter the harbour of Nice.

The deepening of the entrance by means of dredging would seem, therefore, to be highly desirable, now that the tendency is so pronounced towards the employment of large vessels instead of the small craft in former days.

There is a falling-off in this year in the tonnage and in the number of sailing vessels as compared with the previous year, and a corresponding increase in the number of steamers. In the aggregate the year ended with a diminution of two vessels and

Harbour
works
concluded.

Deepening of
the entrance
desirable.

Falling-off in
tonnage of
sailing vessels,
particularly
Italian.

4,490 tons as compared with 1888, while the number of Italian vessels has decreased by 38 and their tonnage by 3,004, in consequence of the rupture of the commercial treaty with Italy.

Heavy dues
on Italian
shipping.

Another cause of this falling-off in the trade, which is carried on by means of small Italian coasters, is attributable to the heavy dues levied on Italian shipping at this and other French ports since the cessation of the treaty. In a report issued by the Chamber of Commerce of this town, I find that some of the industries carried on in my district have been seriously affected by these same dues. Thus it is stated therein by M. Jules Gilly, a highly respected and competent member of that body, that "the production of chaux hydraulique, cements, and plaster of Paris occupied a considerable number of limekilns, and gave rise to a considerable transport by land and sea. This industry is, however, now greatly diminished, and is, in fact, in a state of complete decadence." M. Gilly thus proceeds to describe the cause of this state of things:—"One-third of the total output of these limekilns used to be exported to Italy; that market has been entirely closed by the rupture of commercial relations with that country. Another third used to be carried across to Algeria by means of small sailing vessels, almost always of Italian nationality, and which used to charge a freight of 6 fr. per ton. Since the suppression of this coasting trade, by reason of the increased shipping dues on Italian bottoms, the only method of transport is by means of French steamers, which charge 15 fr. per ton; this increase of 9 fr. per ton on a product of inferior intrinsic value, such as cement, has had the effect of entirely stopping the export to Algeria. Under these conditions the production of chaux hydraulique, cement, and plaster of Paris is destined to disappear, unless new conventions with Italy should come to alter this deplorable state of things."

Report of
Chamber of
Commerce.

Cement and
plaster indus-
tries affected
by harbour
dues.

It will thus be seen that the heavy dues imposed on Italian shipping, and intended to ensure a corresponding advantage to French shipping, are simply causing the destruction of a formerly sufficiently prosperous trade and its corresponding local industries.

Effects of
protection on
French
shipping.

No more eloquent example could be given of the widespread ruin caused by the system of protection as applied to shipping, nor does it appear, moreover, that French shipping has reaped the corresponding advantage it was sought to secure to it, for it is found that the total French tonnage entered at the port of Nice was—in 1888, 153,680 tons; and in 1889 it had fallen to 147,134 tons. So that the advantages supposed to have been secured to French shipping have actually resulted, under the operation of the cessation of the treaty of commerce with Italy, in a decrease in the French tonnage itself.

In support of M. Gilly's contention with regard to the great diminution of the cement trade, I would point to the tables annexed to this report, by which it will be seen that the export of cement was 2,807 tons in 1888, and had dwindled down to 1,332 tons in 1889; that is to less than one half in a single year.

There is, in fact, no doubt whatever of the very great damage caused to my district by the cessation of the former commercial relations with Italy, and our Chamber of Commerce, in the report above alluded to, has unflinchingly expressed its opinion "that the system of commercial treaties inaugurated in 1860 enabled this region to draw from Italy, on most advantageous terms, the greater portion of the food it consumed;" while in another part of the same I find it stated "that the duty of 5 fr. on cereals weighs heavily on our population." It is true that this same Chamber of Commerce, while acknowledging the harm suffered by this district through the present heavy duties on foreign produce, is nevertheless protectionist at heart, and when establishing what it considers as the principle which ought to guide the French nation in its commercial intercourse with foreign nations, declares that, while demanding that the general tariff be modified to suit our local needs and conditions, it nevertheless asserts that, as a general rule, France should protect what she produces, and allow what she does not produce to enter duty free. It does not see that this is precisely the course France has been following with disastrous results, and that it is encouraging a kind of tug-of-war between the interests of the several districts between which France is divided, in which each one is trying to get the better of the others, and to have its own interest, or what it conceives to be such, specially attended to, while regarding those of all other districts with profound indifference.

Serious effects of cessation of commercial treaty with Italy.

Hitherto the agriculturists of the north, who grow breadstuffs and rear cattle, having clamoured to good effect, have it all their own way, and are enjoying their protection at our expense, while we in the south are suffering precisely from the application of the principle our Chamber of Commerce so gravely enunciates as generally desirable, for we grow no corn and rear no cattle, and are obliged to pay for the benefit of those who do. But this is not all, our Chamber of Commerce appears to me equally shortsighted with regard to what we do grow; for instance, when in obedience to the general rule above-mentioned they recommend that a duty of 10 fr. be imposed on Italian olive oil, in order to protect our home-grown oils, they appear to forget that unless the latter were mixed with the stronger and more fruity oils of Bari in Calabria, they would with difficulty find a market. Consequently they seem to be striving, unconsciously, to ruin the export of our principal article of production; and they are doing this at the time when they themselves acknowledge that our olive crops suffer chiefly not from want of protection, but on account of the high price of labour at the time of the gathering of the olives: these falling to the ground in larger quantities than can be at once collected, great numbers being thus lost.

Suffering of district from protection.

Chamber of Commerce proposes a duty on olive oil.

It is stated that the high price of labour is owing to the gradual depopulation of the country districts, and the gravitation of the labourers towards the towns, and this is undoubtedly the case to a serious extent. This being so, it would seem that the importation of foreign labour would be the only means of reducing

Depopulation of country districts and high price of labour.

the wages of labour and remedying so considerable an evil; but it is nevertheless considered patriotic even in the south of France, where foreign labour is most necessary, to clamour against it and to demand protection for the French labourer against his foreign rival, nor has a single voice been raised, that I know of, against the proposed tax on foreigners.

District produces only a fraction of what it consumes.

In fact, it is impossible not to see that protection is here depressing in its effects, and this is the more apparent in a district like my own, which produces only a fraction of what it consumes, and where the sudden large influx of strangers each winter renders more necessary than elsewhere the sudden recourse to foreign markets.

Signs of a tendency to return to the *régime* of commercial treaties.

I am happy to say, however, that there are signs, if not of a tendency to free trade, at least to more moderate counsels of protection, and there is a somewhat widespread desire for a renewal of the *régime* of commercial treaties. People are beginning to talk for the first time of the interests of the consumer, and, although the fallacies of protection are exceedingly difficult to eradicate, I think the truth is gradually, though very slowly, making its way to the surface.

Debt of the town of Nice and *surtaxe d'octroi*.

With regard to the town of Nice itself, the cessation of the Italian treaty and the consequent increase in the duties is not the only source of the enhanced price of living. During the eight years' term of office of the late mayor a debt of no less than 15,000,000 fr. (600,000*l.*) was contracted, the interest of which, together with a payment of nearly 965,000 fr. (40,000*l.*) a year to a sinking fund, is not only provided for by the addition of 22 c. additionnels on each franc of Government taxes, or nearly one quarter, as a local rate, but by a "*surtaxe d'octroi*," which is calculated as yielding some 340,000 fr. (14,000*l.*) a year. It is indeed a serious change which has taken place of late years, and families with small fixed incomes, as well as all the poorer classes, suffer very severely.

Brilliance of the Nice season.

The season as regards the number of strangers has been a very good one. A friend at one of the large local banks tells me he has never had so large a number of clients as this year, and the business done has exceeded that of other years. I have seen no figures as to the number of strangers actually present in Nice during the winter. No reliable statistics exist, however, and I hardly like to hazard a guess, but I should think the total number having spent at least a week or more in the place could not be set down as far short of 40,000.

New railways.

With regard to the new railway schemes, I stated in my last report that the Nice-Digne line was in abeyance. It has since been granted by Government, but only as regards certain sections, which are to be shortly executed, it is said, but there is no doubt whatever that Nice will not enjoy this short cut into the heart of France for many years to come.

The railway which is to connect Nice with Grasse and Draguignan is in progress, and the bridge over the Var at Manda is nearly finished. This line is, however, of much less value than

the Nice-Digne line, as it runs nearly parallel to the existing coast line, and but a few miles more inland.

The single line between Nice and Ventimiglia is in process of conversion to a double line, at least in the section between Nice and Monaco, which will necessitate the enlargement of the many tunnels, and will be a most expensive undertaking. It is to be hoped that this improvement will, as I have advocated for several years in my reports, be pushed on to Ventimiglia, and be completed by the time the Italian line from Piedmont to the coast is completed. A short branch to the harbour of Nice will then be alone wanting to place this port in direct communication with North Italy. Here nothing is thought of the commercial advantages likely to result from such communication, and a great clamour is periodically raised over the plan of a line from Nice to the Col de Tende, viâ Sospel, which would have to be carried through a series of barren mountains at enormous cost; but when the Italian line above-mentioned shall be an accomplished fact, and shall be connected at Ventimiglia with our existing coast line, it will be the Niçois own fault if they do not use it to divert a portion of the ever-increasing trade of Savona and Genoa with North Italy to their own port, provided the custom-house can be induced to give facilities for the forwarding of goods in transit. Nice need not fear the construction of a rival harbour at Ventimiglia, situated as that place is on an open shingle beach at the mouth of a shallow river.

The promenade pier is being rapidly covered with huge buildings which already obstruct the view, and will, I presume, become another casino. It is to be opened next season. Promenade pier.

The plan I have advocated of constructing one or two English hotels on the hills which surround Nice is still in abeyance, but it appears to be about to be taken up by a French company as far as regards the western quarter of Nice, and our own countrymen would do well to bestir themselves before the best sites which are still vacant get taken up; in the meantime an hotel, it is said, is to be built by an English company at Beaulieu. Hotel construction.

A funicular railway is greatly wanted from the Ponchettes up to the Chateau Hill; it would be short, and I am sure would pay. At present the access to that hill, which is so prominent a feature in the middle of the town of Nice, and which possesses shady walks and a beautiful view, is irksome in the extreme. A Swiss company has sent in a plan to the municipality, and British firms might with advantage follow their example. Funicular railway wanted.

At present this hill, although possessing a carriage access on its eastern or farther side, is almost deserted, and yet the panorama visible from it is far finer than that presented by the Californie Hill at Cannes, which enjoys so considerable a fame.

A café, such as the noted Rumpelmayer has established in the various Riviera towns, should be constructed at the top, and take the place of the present one on the Boulevard Victor Hugo. It is true that the hill or a large portion of it belongs, it is said, to the military authorities, but doubtless part of it could be procured from them on a lease.

RETURN of all Shipping at the Port of Nice for the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	19	17,055	19	17,055
French	348	28,626	397	118,508	745	147,134
Italian	187	19,720	16	4,460	202	24,180
Spanish	27	2,773	13	3,972	40	6,745
Greek	7	1,936	...	...	7	1,936
Austrian	7	2,465	...	...	7	2,465
Norwegian... ..	2	641	...	...	2	641
Russian	1	679	...	...	1	679
Turkish	2	225	...	...	2	225
Total	581	57,065	444	143,995	1,025	201,060
„ for the year preceding	623	61,813	404	143,746	1,027	205,559

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	19	17,128	19	17,128
French	351	22,922	395	108,853	746	131,775
Italian	188	23,071	13	4,240	201	27,311
Spanish	23	2,237	12	3,691	35	5,928
Greek	7	1,754	...	...	7	1,754
Austrian	4	1,942	...	...	4	1,942
Norwegian... ..	1	360	...	...	1	360
Russian	1	679	...	...	1	679
Turkish	2	225	...	...	2	225
Total	577	53,190	439	133,912	1,016	187,102
„ for the year preceding	618	46,058	401	151,439	1,019	197,547

RETURN of the Principal Articles of Import to Nice during the Years 1889-88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Coal	Tons ...	25,977	£ 26,216	24,400	£ 27,328
Charcoal	„ ...	3,736	1,349	3,049	1,220
Timber... ..	„ ...	2,917	11,084	2,216	10,081
Building materials	„ ...	421	67	182	214
Marble	„ ...	221	113	404	969
Paving stones	„ ...	...	...	133	53
Cereals	„ ...	17,621	176,210	15,473	136,162
Flour	„ ...	18,000	237,600	107	1,498
Beans and caroubes ...	„ ...	10,897	41,408	2,204	969
Wine	Gallons...	3,657,655	397,853	3,350,135	288,213
Oil	Tons ...	11,168	509,778	2,583	113,858
Other articles	„ ...	3,600	11,000	2,545	2,472
Total	...	...	1,809,590	...	583,017

RETURN of the Principal Articles of Export from Nice during
the Years 1889-88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Olive oil	Tons ...	1,000	60,000	987	33,507
Coke	??	4,082	3,524	4,408	3,705
Cement and plaster	??	1,332	906	2,807	1,868
Planks	??	923	3,202	176	633
Glass and pottery	??	118	1,416	72	1,408
Old iron	??	147	3,000	45	90
Empty casks	??	447	4,500	147	1,176
Macaroni	??	36	760	2	60
Other articles	??	...	...	3,526	5,961
Total	...	...	77,308	...	56,982

STATISTICS of Octroi at Nice.

Articles.		1889.		1888.	
		Quantity.	Dues Levied.	Quantity.	Dues Levied.
Wines, spirits, beer, and lemon- ade	Gallons ...	5,665,035	32,900	3,032,088	31,960
Meat and provisions	Tons ...	9,080	34,400	9,528	32,068
Fuel, candles, &c.	??	46,135	8,567	45,078	8,361
Fodder and cereals	??	17,773	5,017	16,606	4,949
Building materials	??	54,739	8,050	71,635	8,677
Other articles	??	1,052	2,960	1,002	2,835
Total	...	...	61,884	...	88,240

CANNES.

Mr. Vice-Consul Taylor reports as follows:—

Under this heading there is very little to be said differing from Commerce. previous years, the only thing worthy of special note being an increase in the imports from England. The total imports therefrom in 1889 were between 7,000*l.* and 8,000*l.* in excess of 1888, whereas the total imports from all quarters were less by over 18,000*l.*, and this amount is accounted for by the decrease from Italy alone. There is also a decrease from Russia, Algiers, and Austria, and on the other hand an increase from Spain, Sweden, and Turkey. The increase from England is principally on beers and spirits, tissues, machinery, and furniture; the amount of coals imported being about the same as in 1888.

The season at Cannes is, on the whole, a tolerably satisfactory Local one, though grave fears were entertained at the commencement industry. when it was seen that there was a lack of English visitors; and this has to a great extent continued, consequently business in general has not been so flourishing, and little or no building has been done. Cannes, however, has not lost its popularity as a favourite winter resort, for at the moment of writing it would be difficult to get a bed in any hotel.

The octroi returns again show an increase on the receipts Octroi

of the previous year by nearly 2,000*l.*, the gross receipts in 1889 being 29,463*l.*, as against 27,235*l.* in 1888.

Local
improve-
ments.

There are signs of continuous improvements in the town, notably in lighting, the main thoroughfare being now brilliantly lighted throughout the centre of the town with Strauss's intensive burners, and the erection of a new and more commodious post-office is in contemplation.

Drainage.

The drainage question still continues to seriously occupy the attention of the town authorities and of the medical practitioners, and there is every reason to believe that a satisfactory solution will shortly be arrived at. The hotels and villas are now so well drained on the most modern English principles that a general system of drainage is now almost indispensable for the disposal of the sewage.

Harbour.

Plans and proposals for the extension of the breakwater, and for the improvement of the harbour, are engaging serious attention, and are likely to be carried out. When completed, it is intended to levy harbour dues on all vessels entering the harbour.

Health.

The health of the district has been remarkably good throughout the year, though Cannes did not escape its share of influenza, though it appeared in a very moderate form in most cases.

Consular
agents.

The following Powers besides Great Britain are represented at Cannes by Consular agents:—The United States of America, Switzerland, Italy, Denmark, Sweden and Norway, Belgium, Greece, Austria and Hungary, Holland, and the Argentine Republic.

Annex A.—REPORT of all Shipping at the Port of Cannes in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	7	4,966	7	4,966
French	230	11,550	52	14,347	282	25,897
Italian	35	2,275	...	...	35	2,275
Spanish	5	422	1	242	6	664
Swedish	1	342	...	...	1	342
Greek	1	256	...	...	1	256
Austrian	3	1,054	...	...	3	1,054
Other countries	...	...	1	962	1	962
Total	275	15,899	61	20,517	336	36,416
„ for the pre- ceding year ...	279	18,007	57	19,635	336	37,642

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	6	4,258	6	4,258
French	226	11,196	52	14,098	278	25,294
Italian	35	2,275	...	...	35	2,275
Spanish	5	422	1	242	6	664
Swedish	1	342	...	...	1	342
Greek	1	256	...	...	1	256
Austrian	3	1,054	...	...	3	1,054
Other countries	...	...	1	962	1	962
Total	271	15,545	59	19,560	331	35,105
„ for the pre- ceding year ...	275	17,865	57	20,237	332	38,102

Annex B.—ARTICLES Imported at the Port of Cannes during the Year 1889.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Meat, salted and preserved ...	Tons, cwts.	2 9	£ 197	1 15	£ 138
Cereals (wheat, barley, oats), ground or not ...		2,097 0	41,940	2,740 0	54,780
Cereals other than the above ...		3 15	90	2 13	63
Fruits, fresh and dried ...		8 0	641	14	58
Sugar, biscuits, syrups, coffee, and tea ...	Tons, cwts.	8 13	1,382	8 11	1,372
Oils and essences ...		4 0	199	2 0	100
Timber, coke and charcoal ...		2,297 0	7,350	2,242 0	8,872
Hemp, dressed ...		18 13	298	23 0	367
Fodder (bran and oilcake) ...	Tons, cwts.	162 0	162	440 0	4,800
Marble, rough and worked ...		67 0	1,069	72 0	1,151
Coal ...		7,000 0	9,801	8,434 0	11,808
Soaps, candles, spices ...		10 8	519	7 12	380
Wine ...	Gallons ...	137,153	14,889	203,868	22,018
Beer and spirits ...	Tons, cwts.	3,806	1,028	1,340	360
Pottery and glass ...		14 0	383	13 13	273
Fabrics, woven ...		10 0	3,926	1 8	563
Machinery, iron and brass work ...		36 12	2,197	8 15	527
Furniture and wood work ...	Tons, cwts.	53 5	3,267	6 9	376
Carriages ...		1 1	333	9	140
Total ...	...	...	89,671	...	108,146

Annex B.—ARTICLES Exported at the Port of Cannes during the Year 1889.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Glass, fine ...	Tons, cwts.	...	£ ...	3 17	£ 310
„ common ...		...	...	...	...
Spirits ...	Gallons ...	613	331	47	25
Old iron ...	Tons, cwts.	82 10	660	52 0	417
Pottery, common ...		1 0	12	2 17	34
Deal board ...	Tons, cwts.	5 6	64	...	...
Coke and coal ...		135 0	162	...	...
Total ...	...	...	1,229	...	786

Annex C.—PORT of Cannes.

Country.	Exports.		Imports.	
	1889.	1888.	1889.	1888.
	£	£	£	£
Great Britain	..	..	23,277	15,615
France, Algiers	..	..	36,923	48,557
Italy	1,217	786	2,352	20,532
Spain	..	..	13,274	8,923
Russia	..	..	986	1,510
Germany	..	..	..	..
Austria	12	..	4,259	10,757
Turkey	..	..	6,440	..
Greece	..	..	..	..
U.S., America	..	..	..	..
Other countries	..	..	2,160	672
Canada	..	..	..	1,581
Total	1,229	786	89,671	108,147

STATISTICS of Octroi at Cannes.

Articles.		1889.		1888.	
		Quantities.	Dues Levied.	Quantities.	Dues Levied.
Wine, spirits, beer, &c. ...	Gallons ...	1,134,433	£ 6,745	1,080,000	£ 6,290
Meat, cheese, and other provisions ...	Tons ...	2,910	12,657	2,700	11,980
Wood (fuel), coal, candles, &c. ...	" ...	19,234	2,804	13,680	2,690
Fodder and cereals ...	" ...	11,000	3,095	9,574	2,635
Building materials ...	" ...	55,778	3,141	57,000	2,740
Other articles ...	" ...	613	1,921	582	900
Total ...	...	...	29,463	...	27,235

MENTONE.

Mr. Vice-Consul Palmaro reports as follows:—

The movement in the port of Mentone during the year 1889 is represented by the following figures:—

In all 45 merchantmen entered the harbour, and there discharged cargoes amounting to 2,448 tons. Of these vessels 1 steamer was English, which discharged 487 tons, whilst 5 French sailing ships discharged 491 tons: French steamers none. 33 Italian sailing ships discharged a total of 1,437 tons, and 6 Italian steamers discharged in all 34 tons, bringing the grand total of Italian charter to 1,470 tons burden. Other nationalities were entirely absent. In the year 1888 the total of tonnage discharged amounted only to 1,538 tons, thus showing a rise of 910 tons for the year 1889.

The lapse of the French commercial treaties with Italy made importers seek elsewhere for such produce as wine, staves, wood, charcoal, and marble. The first-named article was sought for in

Spain or in the Greek Islands, whilst charcoal was brought from Tropez, St. Raphaël, and other neighbouring forests on French territory. This is not apparent in the above statistics, since the chartering of the usual Italian vessels was in no wise interfered with. A single English steamer brought a cargo of coal, and immediately after the earthquake in 1887 materials for two or three wooden chalôts were imported from Norway.

The French Government has just completed the harbour works. Harbour works. A magnificent sea-wall completely shelters the port from the south and westerly winds. The country around Mentone produces an excellent quality of lemons in abundance, which, during the present winter season, are sold at 15 fr. per 1,000, the question suggests itself as to whether English importers might not find this produce worthy of their attention. The average lemon crop may be estimated at something like 70 tons per annum. It is, however, easily capable of great extension, being a product to which the native willingly betakes himself as one he understands, whereas market gardening for early vegetables, to which the winter climate is particularly favourable, he is, as a rule, inclined to neglect. For instance, new potatoes, grown for exportation, commencing in November and continuing throughout the winter, could be produced with the greatest facility in regularly succeeding relays, as individual experience has repeatedly proved. Until March, and even April, however, the supply in the local market is scanty, insufficient, intermittent, and costly. Yet some English seedlings, planted at intervals of three weeks in some private gardens here, produced, by means of irrigation during dry months, magnificent crops from November till April. Were the land, indeed, intelligently and scientifically chosen and cultivated for the purpose, strawberries, which, in certain sites, ripen freely in the open air at Christmas, without even bell glasses or "cloches," could, together with winter peas and asparagus, each unforced, supply the London and Paris markets at an unprecedentedly early period. At present, one gardener by profession, a Parisian, alone seems alive to the precious possibilities contained in certain sunny and sheltered nooks, and he regularly furnished the famous Hôtel de Paris, at Monte Carlo, with much of its consumption of winter delicacies in the way of preternaturally early fruit and vegetables. For the most part, however, the local market has to draw its supplies even of cabbages and onions from Nice and elsewhere. This subject may possibly interest British capital engaged in horticulture.

The olives, unlike those of Provence, are grown upon umbrageous trees almost as tall as small oaks, and produce an excellent and abundant oil from a diminutive dark berry. The crushing mills, water-worked, are, however, still universally primitive in construction and method, but little changed, indeed, since the time of the Romans, and naturally the oil is therefore wasteful and costly in production. Near Florence the very same quality of berry is made to produce a superior oil, that commands a better price in the foreign markets than ours, simply owing to improved

machinery. The Florentine mills are worked by an English company, and pays a good dividend.

A short cut to competency is, however, found for the native rural population of the whole district, as well as for that of the surrounding country beyond the frontier, in the yearly advent of the large foreign colony. The old people generally remain on the land, and tend it as well as they are able, in the absence of lusty sons and daughters, married and single, who find service, employment, or trade in villas, hotels, and shops during the winter months, and who, together with crowds of Swiss and Italians, return to their land at the end of the season.

During the two succeeding years following the earthquake, there was a marked fall in the number of visitors. The collections at the principal English church diminished, by a natural sequence, nearly 50 per cent., but the late season of 1889-90 has been an extremely good one, and entirely brought back the usual influx. The best hotels were full to overflowing, and were obliged for many weeks to reject all fresh applicants. Mentone suffered but slightly from the universal epidemic of influenza—much less than neighbouring places—and it in no way interfered with the continual gaiety and animation that prevailed. English visitors largely predominated in numbers over other nationalities; and British capital, as a consequence, has been invested in land. Several fine villas have been built, particularly upon the sheltered site now opened up in the neighbourhood of the Boulevard Victoria. The new road, so named in commemoration of her Majesty's visit here in 1882, is cut out of the rock at the cost of 16,000*l.*, and is some 200 feet above sea level, and open only to the south and west.

A Scottish church in the centre of the town will be under construction this summer.

The value of land in the immediate neighbourhood of Mentone averages from 6 fr. to 25 fr. per square yard, but within the actual precincts of the town the price rises at the minimum to 150 fr. the square yard. The legal expenses of the purchase of land are estimated at about 8 per cent. on the purchase money. Iron beams and joists for building purposes are in considerable request, and in one instance an enterprising local builder addressed himself to a firm in Stockport for these materials. The reply to his letter of inquiry was written in English, like the accompanying price list, with its technical explanations of illustrations: a trifling fact, but one which threw the bewildered builder into the arms of a Belgian instead of an English firm.

The Mentone pottery is justly renowned, but its quantity is limited, being the production alone of one artist and his wife, Monsieur and Madame Magnan. Her Majesty has repeatedly expressed her admiration and approval, and has sent large orders for Balmoral and elsewhere. H.R.H. the Princess Beatrice took lessons in the art from Monsieur Magnan, and has since furnished him with designs. The Queen of Saxony, at present in Mentone, has likewise ordered many pieces. The ware, which is in great

request amongst connoisseurs, is capable of high glaze and intense colour, the blues and yellows being particularly fine, while the modelling and grouping of the flowers in life-size placed exteriorly lends it a special if not unique character.

Flowers are another local produce that reach England in considerable quantities, though chiefly through the medium of visitors and the post. There are small local distilleries also for orange flower and other perfumes, but the crude essence is alone extracted and sent to larger distilleries at Grasse, &c., for the final manipulations. Sweet and bitter oranges, excellent for marmalade, grow in profusion, but the sugar duties render jam-making less profitable than in England, and English preserves, groceries of all kinds, including English imported tea and English beer, are largely in demand by the foreign colony.

In the beginning of the winter of 1889 the French Home Office issued instructions to the Prefects ordering them to see that all doctors of foreign nationalities had passed the necessary high degrees of the French schools of medicine. So far as Mentone was concerned the decree in nowise affected its foreign practitioners, who were all duly so provided beforehand.

RETURN of all Shipping at the Port of Mentone in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	1	487	1	487
French	54	2,895	18	1,582	72	4,477
Italian	33	1,437	6	34	39	1,471
Total	87	4,332	25	2,103	112	6,435
" for pre- ceding year	116	5,289	1	532	117	5,821

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	1	487	1	487
French	55	2,235	18	1,582	73	3,817
Italian	27	1,087	6	34	33	1,121
Total	82	3,322	25	2,103	107	5,425
" for pre- ceding year	119	5,648	1	532	120	6,180

RETURN of the Principal Articles of Import to Mentone during
the Years 1889-88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Coal	Tons ...	1,076	1,950	1,505	2,693
Coke	" ...	18	74	63	259
Wood for building	" ...	711	2,130	852	2,550
Building materials	" ...	...	...	12,046	20,077
Marble	" ...	5	50	10	102
Corn and oats ...	" ...	...	...	130	4,006
Olive oil	" ...	311	18,950	255	15,540
Wine	Gallons ...	226,660	17,290	249,040	18,110
Other articles ...	Tons ...	14,134	44,550	1,789	15,034
Total	...	...	84,994	...	78,371

RETURN of the Principal Articles of Export from Mentone
during the Years 1889-88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Citrons	Tons ...	66	1,145	43	745
Plaster and cement	" ...	22	85	106	160
Timber, planks...	" ...	43	165	43	186
Glass and pottery	" ...	4	38	10	82
Old iron	" ...	10	17	5	8
Empty casks ...	" ...	38	450	146	1,751
Other articles ...	" ...	132	1,460	88	964
Total	...	...	3,305	...	3,896

STATISTICS of Octroi at Mentone.

Articles.		1889.		1888.	
		Quantity.	Dues Levied.	Quantity.	Dues Levied.
			£ s.		£ s.
Wine, spirits, beer, &c.	Gallons ...	353,738	2,870 0	293,751	2,396 10
Meat and provisions	Tons, cwts. ...	1,206 10	4,798 12	967 10	3,675 10
Fuel, candles, &c.	" " ...	5,385 9	1,267 12	4,303 2	928 0
Foodstuffs and cereals	" " ...	2,087 17	567 0	1,509 12	402 10
Building materials	" " ...	16,514 18	1,014 0	223,611 2	1,028 10
Other articles ...	" " ...	223 3	303 0	144 4	205 0
Total	...	...	10,840 4	...	8,636 0

MONACO.

Mr. Vice-Consul Smith reports as follows:—

Commerce.
Imports.

I must confirm my first report, viz., that of last year, to the effect that the Principality of Monaco not being a manufacturing or commercial centre, and the area being very limited, the British trade must always be of a very restricted nature. Coals are the most important item, of which 5,000 tons were imported during the current year; exceptionally, furniture of the value of about 20,000*l.* was imported from England this year, to furnish a large hotel, built by an English company.

Total amount of imports, about 228,661*l*. The exports ^{Exports} amounted to about 9,430*l*.

Being dependent entirely for its prosperity on its reputation ^{Industries.} as a health and pleasure resort, it has, in consequence, only two small industries, that of art pottery and a manufactory of perfumes; the exports of the first are about 15 tons, and the second 8 tons.

During the year a large and handsome hotel has been ^{English} constructed and opened by an English company (the Hôtel ^{capital} Métropole), under the same management as the Grand ^{invested.} and Métropole Hotels of London, on which a sum of about 120,000*l*. has been expended. The building and all arrangements planned by well-known London architects, and the sanitary arrangements carried out entirely by one of the first London sanitary engineers, leave nothing to be desired, and form a perfect guarantee for health to all English visitors. Large as was the number of ^{Statistics of} English visitors during the year 1888, it has been greatly exceeded ^{visitors.} during the current year, and no less than 10,000 British subjects must have stayed in the Principality for more or less extended periods, a large proportion during the entire season.

The casino, which is the centre of attraction, has been greatly ^{Casino.} enlarged and embellished, and, notwithstanding the enlargement, it has been crowded to excess by visitors from all countries. It is regrettable that the administration of this establishment are not more courteous, and their employés more intelligent, in their mode of dealing with visitors, very many complaints being made at the Vice-Consulate by British subjects of the incivility with which they had been treated.

Annex A.—REPORT of all Shipping at the Port of Monaco in the Year 1889.

ENTERED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	4	3,038	4	5,038
French	77	3,978	10	206	87	4,184
Italian	19	1,012	...	...	19	1,012
German	...	...	1	551	1	551
Total	96	4,990	15	5,795	111	10,785

CLEARED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	4	...	4	...
French	77	...	10	...	87	...
Italian	19	...	...	...	19	...
German	...	...	1	...	1	...
			All cleared in ballast.			
Total	96	...	15	...	111	...

Annex B.—ARTICLES Imported at the Port of Monaco during
the Year 1889

Articles.		Quantity.	Value.
			£
Sand	Tons ..	950	120
Building materials	" ..	1,985	2,000
Metal, worked	" ..	220	4,800
Timber, for building	" ..	538	4,280
Marble, rough wrought stone ..	" ..	860	27,000
Wines	" ..	1,275	17,870
Beer	" ..	250	10,496
Spirits	" ..	15	700
Flour	" ..	1,089	21,961
Provisions	" ..	1,209	21,627
Charcoal	" ..	1,180	4,720
Oats and fodder	" ..	1,980	10,296
Firewood	" ..	1,200	8,363
Building slate	" ..	29	640
Coal	" ..	20,040	10,268
Wax candles	" ..	25	1,120
Paper	" ..	150	5,000
Live stock	Head ..	7,443	51,400
Furniture	Tons ..	500	25,000
Other articles	" ..	1,000	6,000
Total		84,495	228,661

Annex B.—ARTICLES Exported at the Port of Monaco during
the Year 1889.

Articles.	Quantity.	Value.
	Tons.	£
Empty casks	100	4,000
Wines	50	800
Perfumes	8	960
Coal tar	25	40
Coke	150	280
Old metal ware	50	..
Artistic pottery	15	2,000
Hides	10	650
Fatty matters	8	300
Other articles	100	400
Total	516	9,430

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REPORT FOR THE YEAR ~~1889~~
ON THE
TRADE OF NEW CALEDONIA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 521.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1890.*

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FRANCE.

N O U M E A .

Acting Consul Knoblauch to the Marquis of Salisbury.

My Lord,

Noumea, May 7, 1890.

I HAVE the honour, and pending the arrival of Mr. Consul Layard's successor, to forward, herewith, the Consular Report on the Trade, Commerce, and Agriculture of this Colony for the year 1889.

I have, &c.

(Signed) F. KNOBLAUCH.

Report on the Trade and Commerce of New Caledonia during the Year 1889.

Trade and commerce of New Caledonia has considerably improved during the past year. Trade and commerce improved.

Continued rains have ameliorated the pasturage. Livestock has consequently advanced in value. Cattle-holders have been enabled to deliver their stock in excellent condition. The new meat contract with the Government at higher rates has developed the financial situation. Mining has been carried on on a large scale, shipments of importance have been effected to France and England, also Australia. The rise in the metal market at home had a favourable impression on mining in general. Rain. Livestock. Mining.

The increased labour, both free and convict, has thrown a general improvement of wealth upon the population; money is easier. Labour. Money.

Emigration to New Hebrides will be permitted in 1890. The two large mining companies, the "Nickel" and the "Mines du Nord," have extensive smelting works in Thio and Pam; their furnaces are in full activity, and considerable shipments of smelt, copper, nickel, silver lead and cobalt have gone forward. Rough ore, nickel, chrome, and cobalt is exported from the colony in large amounts for Europe by both French and English vessels, also to Australia. British shipping has a fair share in both import and export. New Hebrides. Smelting. Ore. British shipping.

Australian United Steam Navigation Company.	The Australian United Steam Navigation Company of Brisbane has renewed its contract for a monthly mail from and to Sydney, though the subsidy barely covers the heavy pilot and other Government fees; the company has a constant fair freight to and from Sydney.
French shipping.	The French Mail Company, being very independent, encourages greatly the shippers to avail themselves of British shipping. The French boats arrive very irregularly.
New steam line.	A new French steam line between New Caledonia and Sydney is under consideration, but I doubt whether it will succeed.
Coast trade.	The trade on the coast of New Caledonia is regularly supplied by bi-monthly steamers.
New Hebrides.	Since the loss of the ss. "Caledonian" the communications are very irregular. The Australian United Steam Navigation Company call now at Anatam, where a small steamer belonging to the company collects the produce of all the New Hebrides Islands. The company consequently does a large trade.
Agriculture.	The colony has had a remarkable success this year in agriculture, owing to the abundant rains.
Maize.	Maize has had a fair share in export, and is well quoted on the Sydney market.
Coffee.	Notwithstanding the heavy home consumption a good deal went to Australia.
Lucerne and hay.	Lucerne and hay were in good supply.
Rice and beans.	Rice and beans came forward in larger quantities, though not sufficient to avoid imports.
Tapioca.	Tapioca is now manufactured in the penal settlement of Bourail out of manioc, and of good quality.
Finance bank.	Capital is abundant. The money market has become much easier. The Bank of Indo-China is of considerable help in commercial, mining and agricultural transactions. It is only to be regretted that the statutes of the bank give only a limited power to the managers. Interest on accounts current is at 12 per cent., and on mortgages at 8, 9, and 10 per cent.
Interest.	
Industry.	The Meat Preserving Company in Gomen is now in full activity; it does not limit itself to its government contract, but supplies the merchants' wants for the colony. The company exports hides, skins, tallow, hoof, corn, &c., to Australia, and manufactures soap of very good quality.
Soap.	
Arms and munitions.	Arms and munitions continue to pass through Noumea for transhipment to the New Hebrides.
Annexes A., B., C. and D.	Annexes A., B., C. and D. show the returns of imports and exports during 1889, and their respective and total value.
Remarks on imports and exports.	In both imports and exports the official lists do not give any particulars with regard to foreign shipping. However, with exception of American vessels bringing timber and the French mail steamers from France, the bulk of the import falls to British shipping bringing English and some German goods from England and Australia.

Annex A.—RETURN of all Shipping at the Port of Noumea in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	38	3,357	40	41,149	78	49,506
French	8	3,421	21	38,411	29	41,832
Other countries* ...	11	4,026	...	...	11	4,026
Total	57	15,804	61	79,560	118	95,364
„ for the year preceding ...	39	3,710	75	75,289	114	83,999

* 1 Swedish, 1 Italian, 9 American.

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	43	3,832	39	41,070	82	50,902
French	6	2,677	21	38,411	27	41,088
Other countries* ...	6	2,491	...	...	6	2,491
Total	55	15,000	60	79,481	115	94,481
„ for the year preceding ...	47	3,287	62	68,937	109	75,224

* 1 Swedish, 1 Italian, 4 American.

Annex B.—RETURN of Principal Articles of Import to New
Caledonia during 1889.

Articles.	Value.
	£
Live stock—horses, donkeys, and sheep	8,823
Groceries	46,188
Produce, potatoes, vegetables ..	10,215
Timber	11,252
Coal	17,835
Arms and munitions	4,109
Oil and paint	11,209
Wine, spirits, and liquors ..	74,186
Building materials, cement, brick, and galvanised iron	5,993
Drapery and haberdashery ..	51,641
Tobacco	7,649
Flour	43,870
Leather and saddlery	2,399
Furniture	2,903
Machinery	7,712
Carriages	986
Ironmongery	28,257
Ore and maize bags	6,218
Crockery	2,244
Stationery	3,154
Articles of Paris	3,934
Jewellery	2,419
Wrapping paper	1,331
Hay and lucerne in bales ..	2,360
Rope and sailcloth	2,570
Other articles	24,615
Total	379,072

Annex C.—RETURN of Principal Articles of Export from New Caledonia during 1889.

Articles.		To France.		To Foreign Countries.		Total.
		Quantity.	Value.	Quantity.	Value.	
Preserved meat...	Cases	16,913	£ 40,591	...	£ ...	£ ...
Ox and calf hides	Number	...	...	17,612	9,984	...
Sheep skins	Bales	...	...	39	47	...
Tallow	Casks	...	...	188	1,128	...
Beche-la-mer	Sacks	...	...	947	3,030	...
Coffee	Bales	...	...	352	2,292	...
Copra	Sacks	...	...	5,790	3,011	...
Mushrooms	Bales	...	...	84	168	...
Beans	...	...	...	711	853	...
Oranges	Cases	...	...	291	116	...
Castor oil plant seed	...	...	...	34	14	...
Sandalwood	Bundles	...	...	35	14	...
Kauri gum	Bales	...	...	872	872	...
Malze	Sacks	...	...	14,806	5,922	...
Chrome ore	Tons	...	...	3,742	5,239	...
Cobalt	...	...	...	2,745,582	8,237	...
Copper	...	...	...	387,400	2,324	...
Nickel	...	...	...	14,960,803	74,804	...
Melted copper	...	36,320	2,906	44,480	3,554	...
nickel	...	...	...	267,531	37,454	...
Cocconut oil	Casks	...	...	148	888	...
Cocconut fibre	Bales	...	...	38	13	...
Rags	Sacks	...	...	102	41	...
Taploca	Cases	16	64	...	...	...
Bones	Sacks	...	...	1,231	492	...
Wool	Bales	...	...	227	1,144	...
Old metal	Parcels	...	...	126	85	...
Silver coin	...	...	39,120	...	...	...
Sundries...	...	...	...	...	424	...
In transit	...	...	...	...	5,518	...
Total	...	...	82,681	...	167,668	250,349

Annex D.—TABLE showing the Total Value of all Articles Imported to and Exported from New Caledonia from and to Foreign Countries during 1888–89.

IMPORT.

Country.	1888.	1889.
French	191,453	160,984
Foreign	176,084	218,088
Total	367,537	379,072

EXPORT.

	1888.	1889.
Colonial and island produce and transit	119,269	250,349

PARTICULARS of Exportation in 1889:—

	£
To France	82,681
„ foreign countries	167,668
Total	250,349

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1890.
ANNUAL SERIES.

N^o. 759.
DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

FRANCE.

REPORT FOR THE YEAR 1889
ON THE
TRADE OF TAHITI.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 635.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1890.*

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1890.

[C. 5895—162.]

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657. Warsaw	$\frac{1}{2}$ d.	715. Rio de Janeiro	$2\frac{1}{2}$ d.
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662. Galatz	$1\frac{1}{2}$ d.	720. Beyrout	1d.
663. Antwerp	1d.	721. Adrianople	$\frac{1}{2}$ d.
664. Boston	1d.	722. Nantes	$\frac{1}{2}$ d.
665. Madeira	$\frac{1}{2}$ d.	723. Caracas	1d.
666. New Hebrides	$\frac{1}{2}$ d.	724. Mogador	$\frac{1}{2}$ d.
667. Riga	1d.	725. Tientsin	1d.
668. Charleston	1d.	726. Foochow	1d.
669. Algiers	2d.	727. Port au Prince	$\frac{1}{2}$ d.
670. Stuttgart	1d.	728. Callao	1d.
671. Havre	3d.	729. Puerto Plata	$\frac{1}{2}$ d.
672. The Piræus	1d.	730. San Francisco	1d.
673. Syra	1d.	731. Philadelphia	$2\frac{1}{2}$ d.
674. Boulogne	1d.	732. Pakhoi	1d.
675. Taganrog	2d.	733. Bilbao	1d.
676. Wuhu	$\frac{1}{2}$ d.	734. Dunkirk	1d.
677. Batoum	1d.	735. Vienna	1d.
678. Manila	1d.	736. Nantes	$1\frac{1}{2}$ d.
679. Tamsui	1d.	737. Paramaribo	1d.
680. Kiungchow	1d.	738. Honolulu	$\frac{1}{2}$ d.
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685. Coquimbo	$\frac{1}{2}$ d.	743. Caldera and Lota	$1\frac{1}{2}$ d.
686. Warsaw	1d.	744. Nice	$1\frac{1}{2}$ d.
687. Ichang	1d.	745. Aleppo	1d.
688. Wénchow	1d.	746. Hakodate	1d.
689. Trebizond	1d.	747. New York	2d.
690. Damascus	$\frac{1}{2}$ d.	748. Cagliari	1d.
691. Savannah (Georgia)	1d.	749. San Salvador	1d.
692. Barcelona	$2\frac{1}{2}$ d.	750. Gothenburg	2d.
693. Santos	1d.	751. Nagasaki	1d.
694. San José	1d.	752. Sofia	$3\frac{1}{2}$ d.
695. Batavia	1d.	753. Meshed	1d.
696. Genoa	$1\frac{1}{2}$ d.	754. Yokohama	$2\frac{1}{2}$ d.
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No. 759.

Reference to previous Report, Annual Series No. 635.

FRANCE.

TAHITI.

Consul Hawes to the Marquis of Salisbury.

My Lord,

Tahiti, April 28, 1890.

I HAVE the honour to forward for your Lordship's information Mr. Vice-Consul Miller's Trade Report for the year ended December 31, 1889, and to state that Mr. Miller requests me to express to your Lordship his regret that the delay in preparing the same has been caused by the continued unsatisfactory state of his health.

I have, &c.
(Signed) C. J. HAWES.

Report upon the Trade and Navigation of the Society Islands in the Year 1889.

TAHITI AND ITS DEPENDENCIES.

There is no progress to report in the trade of this Consular district during the year 1889. The depression complained of in previous reports prevailed throughout the year that has elapsed with still more acuteness than heretofore, owing chiefly to a lack of produce, and the extreme difficulty of making quick and profitable returns. General remarks.

The French Government have ceased to issue drafts on Paris, and in consequence of a further depreciation of the Chilian and Peruvian silver, which is the commercial currency of this place, enhanced prices, leaving little or no profit, have been paid for island products solely for the purpose of effecting remittances.

This unsatisfactory state of affairs has compelled merchants to curtail their orders for goods with which the market appears to be glutted, on account principally of a stagnancy in agriculture.

There is no change in the customs regulations of this port. The system termed "octroi de mer," an ad valorem duty of 13 per cent., continues to be enforced. Customs regulations.

British trade. British goods, consisting principally of prints, calico, hardware, preserves, beer, &c., are brought to this place from Bordeaux and Hamburg in French and German bottoms, and by the way of New Orleans and Panama to San Francisco. As compared with that of all other nationalities it is estimated that the proportion of British trade is about one-fourth.

Imports. The total invoice value of the imports in 1889, amounting to 99,696*l.*, shows with that of the preceding year a decrease of nearly 31,000*l.*

Return of imports and exports. The following return of imports, which for Great Britain, for example, only gives the value of a cargo of coal imported direct from Cardiff, is unreliable, inasmuch as other British goods figure chiefly under the head of United States, through which country they were, as previously explained, brought here.

TABLE showing the Total Value of all Articles Exported from Tahiti and Imported to Tahiti from and to Foreign Countries during the Years 1888-89.

Country.	Exports.		Imports.	
	1889.	1888.	1889.	1888.
	£	£	£	£
Great Britain	29,812	11,466	2,122	..
Australia and New Zealand	10,538	7,561	16,770	19,903
France	19,727	21,345	11,132	21,000
United States	40,096	22,725	68,728	78,322
Germany	11,308	7,503	2,656	..
Chile	2,019	4,400	288	1,418
Other countries	..	..	..	1,857
Total	118,000	75,000	99,696	122,500

In the exports to France is included an estimated value of 2,920*l.* of pearls.

Stores imported by the local Government, and island products, are excluded from the above imports.

Articles of import.

I likewise subjoin a return of the principal articles of import to Tahiti during the years 1888 and 1889.

RETURN of Principal Articles of Import to Tahiti during
the Years 1888-89.

Articles.		1888.		1889.	
		Quantity.	Value.	Quantity.	Value.
Live stock			£ 3,889	...	£ 2,558
Salt provisions			9,359	...	6,625
Flour	Lbs. ...	2,384,416	11,066	2,222,487	7,222
Rice	" ...	385,588	1,681	516,001	2,280
Biscuits	" ...	364,202	2,781	387,600	1,782
Potatoes	" ...	262,337	435	293,575	485
Beans	" ...	54,868	212	62,577	258
Refined sugar	" ...	205,674	2,487	318,122	3,021
Brown "	" ...	665,204	392	...	801
Tea	" ...	9,748	465	7,014	320
Coffee	" ...	374,904	890	87,206	1,490
Olive oil	Gallons ...	970	380	...	350
Dessert biscuits	Lbs. ...	11,442	227	20,172	407
Vegetables, preserved			1,207	...	74
Macaroni and vermicelli	Lbs. ...	6,454	113	4,336	68
Onions	" ...	66,922	216	74,280	141
Wheat	" ...	73,055	210	86,017	213
Barley	" ...	461,145	830	512,492	741
Oats	" ...	7,200	21	2,222	10
Bran	" ...	70,682	125	60,050	116
Opium	" ...	662	517	1,245	896
Wine in cask, red	Gallons ...	49,424	4,307	48,011	3,347
Red wine, in bottle	" ...	1,012	237	804	197
White wine, in cask	" ...	3,353	268	8,264	474
" " bottle	" ...	90	27	416	61
Champagne	" ...	540	300	600	254
Absinthe	" ...	1,190	500	...	735
Vermouth	" ...	823	172	2,076	415
Gin	" ...	744	107	846	61
Rum	" ...	316	53	168	26
Whisky	" ...	100	27	246	78
Beer	" ...	510	500	...	921
Bitters	" ...	145	50	...	71
Amer picon	" ...	48	9	282	50
Liqueur, assorted	" ...	530	174	855	315
Cognac	" ...	1,279	358	2,070	400
Kirsch	" ...	59	15	246	77
Other liquors	" ...	84	22	...	65
Vinegar	" ...	903	61	1,238	91
Alcohol	" ...	53	11	32	8
Mineral waters	Cases ...	79	89	76	71
Linseed oil	Gallon ...	3,353	395	2,352	235
Essence of turpentine	" ...	492	54	456	52
Oils	" ...	...	50	...	37
Coal	Tons ...	4,867	3,295	Unknown.	Unknown.
Bricks	M. ...	13	54	150	210
Cement	Lbs. ...	50,688	182	91,520	211
Iron	" ...	...	306	...	249
Timber	" ...	...	4,375	...	2,914
Hay	Lbs. ...	11,550	29	60,997	68
Drugs	" ...	...	753	...	434
Paints	" ...	...	758	...	626
Perfumery	" ...	...	800	...	952
Soap	" ...	...	2,070	...	1,444
Tobacco and cigars	" ...	...	1,279	...	282
Marches	" ...	...	693	...	206
Calico	Yards ...	15,569	1,850	...	2,161
Paras	" ...	24,987	3,293	...	3,387
Denims	" ...	5,522	1,450	...	474
Silks	" ...	...	2,317	...	1,268
Muslins	" ...	...	484	...	570
Prints	" ...	...	5,414	...	4,473
Other cloths	" ...	...	3,867	...	15,858
Ship's stores	" ...	...	2,503	...	1,833
Other articles	" ...	...	45,860	...	23,527
Value of provisions, naval stores, &c., for local Government			127,950	...	...
			5,450	...	...
Total			122,500	...	99,696

Return of
exports.

THE following is an Approximate Return of the Island Products
Exported during the Years 1888-89.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Cotton, clean and baled ...	Lbs. ...	402,387	£ 16,766	348,134	£ 11,604
Cotton seed... ..	Tons ...	361	650	103	185
Copa	" ...	3,866	34,794	2,346	23,460
Mother-of-pearl shell ...	" ...	583	43,725	387	23,220
Fungus, edible for China... ..	Lbs. ...	78,230	978	51,791	755
Oranges	Number ...	3,148,156	2,518	3,482,000	2,786
Cocoanuts	" ...	848,721	2,544	696,854	2,091
Vanilla	Lbs. ...	8,789	1,768	12,569	6,028
Wool, from Easter Island ...	" ...	19,914	415	13,254	276
Limejuice	Gallons ...	1,640	55	4,279	178
Beeswax	Lbs. ...	19,987	874	2,049	85
Desiccated cocoanuts	" ...	67,652	1,692	107,148	2,679
Coffee	" ...	52,155	2,173	...	...
Arrowroot	" ...	24,107	251	...	...
Turtle shell... ..	" ...	1,052	105	...	...
Hides	Number ...	720	238	591	236
Beche-de-mer	Lbs. ...	39,508	494	2,195	18
Pearls, estimated value	...	...	2,920	...	2,399
Total	...	...	113,000	...	75,000

Agriculture.
Cotton.

The unfailing incentive, consisting of an advance in the prices paid to planters, has had the effect of increasing and improving the cultivation of cotton, hence of supporting the two cotton ginning mills which, even now, are often at a standstill.

Copra and
cocoanut.

Notwithstanding the destruction of many cocoanut trees by a storm which raged in the early part of the year, and the loss of innumerable nuts by a blight which still prevails, there is an excess over last year of about 1,500 tons in the quantity of copra exported. Less desiccated cocoanut has been manufactured, but more cocoanuts have been sent to confectioners in San Francisco.

Vanilla.

In vanilla there is a marked decline. Small lots shipped to San Francisco met with a slow sale, and realised very inferior prices.

Fisheries.
Mother-of-
pearl shell.

Owing, I believe, to some laxity in the application of the existing stringent regulations, about 200 tons of mother-of-pearl shell more than the previous year have been exported from this port. It represents a value of upwards of 20,000*l*.

Pearls.

There is no means of ascertaining the value of pearls, which are forwarded either by post or by private hands. The estimate in the above return is based on no data whatever.

Mail service.

The mail service with San Francisco is carried on as stated in last year's report, and as therein explained there is also a five-weekly steam communication with Auckland, New Zealand. The passage from Auckland occupies 17 days. The return passage from Tahiti is generally performed in a fortnight. For 1889 the first voyage from Auckland commenced on January 12.

Parcel post.

The parcel post service, for which, as already reported, an agreement was come to with the firm of Messrs. Donald and Edenborough, of Auckland, is now carried on with that port by the British steamer referred to under the head of "mail service."

The subjoined table, which bears a favourable comparison ^{Shipping.} with that of the previous year, shows the shipping of all nationalities that resorted to this port during the year 1889.

RETURN of all Shipping at the Port of Papeete, Tahiti, in
the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	8	3,971	9	4,275	17	8,246
Coasters (French)...	162	7,225	46	2,300	198	9,525
French	8	2,994	...	...	8	2,994
United States	19	4,935	...	...	19	4,935
German	4	1,756	...	...	4	1,756
Other countries	7	2,848	...	...	7	2,848
Total	198	23,729	55	6,575	253	30,304
„ for the year preceding ...	169	20,638	49	5,850	218	26,488

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	8	3,971	9	4,275	17	8,246
Coasters (French)...	153	7,130	46	2,300	199	9,430
French	9	3,189	...	...	9	3,189
United States	19	4,935	...	...	19	4,935
German	2	885	...	...	2	885
Other countries	6	2,768	...	...	6	2,768
Total	197	22,878	55	6,575	252	29,453
„ for the year preceding ...	171	20,031	49	5,850	220	25,881

The coasting trade is exclusively reserved to vessels registered at this port.

Subject to fluctuations of exchange, the rates for charges on shipping and customs duties described in the report for the year 1888 were the same for the ensuing year, but instead of 7s. 8d. the wharfage on merchandise is only 1d. per diem and per square metre, and beer and wine, which, when in wood, are exempted from the specific duty of 2½d. per litre, is subject to the ad valorem duty of 13 per cent. Besides the special ad valorem duty of ½ per cent., and the specific duty of about ½d., which are levied on petroleum lodged in Government warehouses, that article is subject to the usual ad valorem duty of 13 per cent., when entered for local consumption.

Subject also to a difference in the rate of exchange, there is no alteration in the tariff for towage of vessels in and out of this port, but besides the tug referred to in last year's report there is a steam launch which, although of little horse-power, may bring about some reduction in the charges. ^{Steam tugs.}

Charges on shipping and customs duties.

Shipping and
quarantine
regulations.

Every vessel entering the port of Papeete is required to deposit at the custom-house, within 48 hours, a detailed manifest of her cargo. Vessels leaving the port are subject to the same formality. No valuation of the goods is given in the manifests.

All ships, except coasters, are boarded by the health officer, and when unprovided with a clean bill of health are quarantined. In every case they are subject to the sanitary dues specified in the report for the year 1888.

Shipping
resources.

With the following exceptions the remarks under this head in the report for 1888 are applicable to the year under review.

Patent slip.
Careening
quays.

The patent slip formerly propelled by steam is, even at the present time, worked by hand, and the careening quays, though in a damaged state, may at a short notice be rendered fit for heaving down vessels of not upwards of 500 tons.

Prices of pro-
visions.

The average market prices of provisions of local consumption are the same as stated in last year's report.

Rate of
exchange.

During the year 1889 the average rate of exchange upon England was 31 fr. 25 c., or 6 dol. 25 c. Chilian or Peruvian, to 17. sterling.

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AND FINANCE.

GERMANY.

REPORT FOR THE YEAR 1888
ON THE
TRADE OF STETTIN

REFERENCE TO PREVIOUS REPORT, Annual Series No. 547

*Issued during the Recess and Presented to both Houses of Parliament
by Command of Her Majesty.*

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485. Port Said	2d.	548. San Salvador ..	¾d.
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487. Boulogne	1d.	550. Nice	1d.
488. Callao	1d.	551. Baghdad	½d.
489. Barcelona	2d.	552. Fiume	1d.
490. Boulogne	2d.	553. Mogador	2d.
491. Taganrog	2d.	554. Buenos Ayres ..	1½d.
492. Kiungchow	1d.	555. San Francisco ..	2½d.
493. Sandakan	1d.	556. Carthagena	¾d.
494. Manila	1d.	557. Syra	1d.
495. Swatow	1d.	558. Varna and Bourgas	1d.
496. Guayaquil	1d.	559. Thessaly.. ..	¾d.
497. Rome	1d.	560. Yokohama	1d.
498. Santos	1d.	561. Nantes	1½d.
499. Boston	1d.	562. Suakin	¾d.
500. Aleppo	1d.	563. Algiers	1d.
501. Bordeaux	2d.	564. St. Petersburg ..	2½d.
502. Valparaiso	1d.	565. Soul	1d.
503. St. Petersburg ..	1d.	566. Newchwang	1d.
504. Rio de Janeiro ..	4d.	567. Roustchouk and Philippopolis	1d.
505. Brest	1d.	568. Stockholm	1½d.
506. Dunkirk	1d.	569. Tonga	1d.
507. Genoa	2d.	570. Chicago	1½d.
508. Beyrout.. ..	1d.	571. Adana	¾d.
509. Colonia	1d.	572. Buenos Ayres ..	3d.
510. Marseilles	1d.	573. Frankfort	1½d.
511. Kiukiang	1d.	574. Canton	1½d.
512. Buda-Pesth	2d.	575. Tamsui	5½d.
513. Wenchow	10d.	576. Palermo	3d.
514. Coquimbo	1d.	577. Amsterdam	1d.
515. Charleston	1d.	578. Ajaccio	¾d.
516. Riga	1d.	579. Shanghai	1½d.
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524. Gothenburg	2d.	587. Smyrna	¾d.
525. Hankow.. ..	2d.	588. Mannheim	1d.
526. Foochow	1d.	589. Nagasaki	1d.
527. Erzeroum	2d.	590. Hakodate	1d.
528. Ciudad Bolivar..	1d.	591. Bushire	1d.
529. Jaffa	1d.	592. Chinkiang	¾d.
530. Ancona	1d.	593. Pakhoi	1d.
531. Savannah	1d.	594. Hiego	1½d.
532. Batavia	1d.	595. Bangkok	1d.
533. Adrianople	1d.	596. Serajevo.. ..	1d.
534. Nisch	1½d.	597. Copenhagen	1½d.
535. Vienna	1d.	598. Cephalonia	¾d.
536. Odessa	8d.	599. Chefoo	¾d.
537. Constantinople..	2d.	600. Guatemala	1½d.
538. Damascus	1d.	601. Tonga	¾d.
539. Tientsin.. ..	1d.	602. Tahiti	1d.

No. 603.

Reference to previous Report, Annual Series No. 547.

GERMANY.

STETTIN.

Consul Powell to the Marquis of Salisbury.

My Lord, *Stettin, August 1, 1889.*
 I HAVE the honour herewith to forward my Commercial
 Report for the year 1888.
I have, &c.
 (Signed) WILFRED POWELL.

Report on the Trade of Stettin for the Year 1888.

The importation of grain by sea to Stettin in 1888 is shown by Grain.
 the following figures:—2,378 tons of wheat, 171,038 tons of rye,
 34,954 tons of oats, 6,920 tons of barley, 1,143 tons of maize, 1,592
 tons of pulse, and 1,418 tons of various other grain amounting to
 219,443 tons.

The export from Stettin by sea for 1888, was:—13,075 tons
 of wheat, 689 tons of rye, 664 tons of oats, 3,285 tons of pulse, 18,659
 tons of barley, and 612 tons various; amounting to 36,984 tons.

The export in potatoes only reached 5,152 tons against 10,294
 tons in 1887.

On January 1, 1888, the stock in hand of wheat amounted to Wheat.
 14,753 tons.

The monthly prices for good sound wheat (74 lb. Neuscheffel
 weight) were as follows, per ton:—January at 167 marks 23 pf.,*
 falling in February and March to 163 marks 72 pf. and 163 marks
 22 pf., rising in April and May to 173 marks 22 pf., and 176

* The average rate of exchange has been, during the month of—							
		Marks Pf.				Marks Pf.	
January	..	20	35 to the £ sterling.	July	..	20	42 to the £ sterling.
February	..	20	36 ditto.	August	..	20	46 ditto.
March	..	20	35 ditto.	September	..	20	46 ditto.
April	..	20	36 ditto.	October	..	20	39 ditto.
May	..	20	38 ditto.	November	..	20	36 ditto.
June	..	20	38 ditto.	December	..	20	37 ditto.
		1	English ton equal to	..	..	1,016	kilos.
		1	" cwt. "	..	..	56	"
		1	meter cwt. "	..	..	100	"

marks 91 pf., with a second decline in the two months following to 168 marks 73 pf., and 167 marks 16 pf. In August a decided advance in prices took place owing to the likelihood of poor crops being obtained during 1888, as these reports were confirmed prices continued to rise. August, 177 marks 22 pf.; September, 184 marks 45 pf.; October, 187 marks 76 pf.; and remained steady at that level until the close of the year.

The yearly average price in Stettin for 1887 was 166 marks 36 pf., and, in 1888, 176 marks 1 pf.; whilst the yearly average price for imported wheat in England was, in 1887, 150 marks, and in 1888, 150 marks 55 pf., showing a difference in Stettin of 10 marks 35 pf., or 10s. 3½d. per ton in England, the differences amounting only to 55 pf., or 6½d. per ton. Again, the difference in yearly average price for 1887 between Stettin and England was 16 marks 35 pf. per ton; and, in 1888, 25 marks 46 pf. per ton, to the advantage of the duty-free markets in England.

Of the exports by sea from Stettin, 11,889 tons went to Dutch and Belgium ports.

The stock on hand at the close of the year amounted to 11,672 tons.

Rye.

The stock in hand at the commencement of the year amounted to 31,230 tons, against 13,611 tons in 1887. The monthly average price for sound rye (weighing in average at least 69·5 lb. per Neuscheffel) was, in the first three months of 1888, 115 marks 33 pf., 113 marks 14 pf.; and 112 marks 16 pf., fluctuating slightly until July between 117 marks 11 pf., and 123 marks 6 pf., 125 marks 58 pf., and 124 marks 91 pf., being, as in the case of wheat prices, affected by the doubtful reports of the coming harvest, and rose in August to 136 marks 94 pf.; September, 154 marks 5 pf.; and in October to 156 marks 65 pf., the highest price reached; a slight reaction setting in, the year closing at 152 marks 17 pf. and 151 marks 31 pf.

It is again interesting to notice the large differences in the fluctuations in prices between those in the port of Stettin and the free port of Bremen, in the latter the rise and fall of prices only moved within the small scope of 10 marks 25 pf. = 10s. 2½d., but in the former the difference amounted to 44 marks 59 pf. = 44s. 6¾d., a proof of the excitement caused to the natural prices by the impost of duties. The larger part of the imported rye was transmitted by river from Stettin to Berlin.

Stock on hand at the end of the year was 19,078 tons.

Barley.

The monthly average prices give a total for the first seven months of 1888 of 119 marks 5 pf., and for the latter part of the year, 145 marks 4 pf., this large difference was caused by the improvement in the quality of the new crops. 18,659 tons were exported of which 12,934 tons went to England, Russia, and Scandinavia. 6,920 tons of barley were imported direct from Russia by sea.

Oats.

The average price from the month of January to the month of July for oats was 114 marks 33 pf., and from August to December, 137 marks 6 pf. The larger part of the import of oats by

sea from Russia was transmitted, as usual, viâ Stettin to Berlin.

The high price of maize, as compared with other grain, very considerably lowered the demand, and but little business was done. An inferior class of American maize being purchased in small quantities. The supply from Roumania was also of very small dimensions. Maize.

The export of potatoes from other parts of Germany, which during 1887 amounted to 132,057 tons, has, in 1888, risen to 215,042 tons, a very considerable increase in which, however, Stettin was not a large participator, as the inconsiderable and unusually small amount of 5,152 tons only came into this market, and was but little more than sufficient for the home consumption, and manufacturing purposes. Potatoes.

For some years past potato fabrications have steadily increased until they have become an important industry in this district, this year (1888), however, shows a slight decrease in the export, possibly through the reduced demand for potato spirit, and dulness generally in the foreign markets. Potato spirit export shows a falling off of 6,700 tons, and the export of potato starch, potato flour, dextrin, starch gum, potato sugar, and potato syrup, amounted to 38,322 tons against 46,106 tons in 1887. Of these 14,488 tons were exported to Zollverein ports, also to Dutch and Belgium harbours; 1,200 tons went to Spain; 1,280 tons to Italy; and 2,340 tons to the United States.

The continual demand for potatoes from abroad kept the prices up, and no doubt also tended to lower the output of manufactured goods from the factories here.

The year's average prices for sound light red, 38 marks 89 pf.; for distil purposes, was paid 27 marks 71 pf. to 34 marks 50 pf. per 1,000 kilos., and, during the last three months of the year, 33 marks.

The import of flour by sea to Stettin during 1888 amounted to 10,023 tons; of this, 9,861 tons were from Zollverein ports, the most part from Dantzic. The export of flour from Stettin in 1888 amounted to 50,352 tons, against 49,260 tons in 1887; 17,967 tons to Dutch, Belgian, and Zollverein ports, 24,084 tons to Scandinavia, 1,658 tons to England, and 6,581 tons of rye flour to France; 17,837 tons of bran were imported, and 6,487 tons exported in 1888, against 3,584 tons imported, and 5,537 tons exported in 1887. Flour and bran.

The business in flour was quiet, caused by the continued wet weather during the summer and its effects upon the year's crop. Most purchasers having covered their wants by delivery contracts dated in the autumn of 1887.

The prices for flour during the year moved between 23 marks 50 pf. and 26 marks per 100 kilos. for wheat flour (00 quality); rye flour (C-1 quality), 18 marks and 22 marks; coarse wheat bran fetched 8 marks 50 pf. to 10 marks; fine, from 8 marks to 10 marks; rye bran, 7 marks 50 pf. to 10 marks per 100 kilos. The sale of bran was throughout the year easy.

Spirit.

The spirit export from Stettin and Swinemünde for 1888 shows a continued decrease; during the last three years it has fallen from 23,692 tons to 19,186 tons, and this year (1888) to 12,445 tons.

The prices during the first four months for home consumed spirit moved between 48 marks 43 pf. and 47 marks 26 pf., and latterly, rose to 49 marks 25 pf. for export spirit; 31 marks 29 pf. to 29 marks 37 pf.; and 30 marks 70 pf. during the remainder of the year; for home consumption, 52 marks 71 pf., 51 marks 62 pf., 53 marks 64 pf., 52 marks 62 pf., and 52 marks 50 pf. were paid.

For export, 33 marks 62 pf., 32 marks 53 pf., 33 marks 75 pf., 32 marks 97 pf., and 33 marks 27 pf.

The year's average price was, in Stettin, for export spirit, without the barrel, 32 marks 19 pf.; whilst in Hamburg (duty free), with the barrel, it was only 21 marks 29 pf.

The stock left on hand at the close of the year amounted to 3·5 million litres.

Beetroot
sugar.

Stettin exported, in 1888, 688 tons of foreign raw sugar, and 45,398 tons of home manufactured raw sugar, against 66,754 tons in 1887; also, 37,101 tons home refined sugar, against 31,006 tons in 1887; 900 tons of raw sugar, home manufactured, were exported from Swinemünde in 1888, against 4,542 tons in 1887.

The prices of both raw and refined sugar sustained a continued fall until the beginning of June, and then gained a little by August.

Prices were, for highly polarized sugar (92° Rendement), per 100 kilos.:—January, 50 marks; February, 48 marks 50 pf.; March, 48 marks; in April and May, 46 marks; in June, 46 marks 50 pf.; July, 47 marks 50 pf.; August, 48 marks (after September, by the new regulation, the prices are given exclusive of the consume duty); September, 37 marks; October and December, 35 marks; November, 36 marks. Prime loaf sugar (inclusive of consume duty):—January and February, 64 marks; March, 63 marks 50 pf.; April, 63 marks; May, 60 marks; June to October, 61 marks; November and December, 63 marks.

Business in refined sugar was, until June, dull, but subsequently, and until the end of the year, fairly satisfactory. The year closed with a smaller stock in hand than usual.

Seeds.

During winter the market in seeds was dull. Foreign purchasers being small, whilst the producers' supplies were continually increasing, causing further reductions in prices during the spring, the wet summer, however, made matters improve, and a greater demand arose for several kinds of seed, more especially in clover-seed, which led to increased prices and some considerable sales.

Red clover during winter fell 6 marks in the 50 kilos., and, in spite of the dullness of the market, stood at 30–42 marks, according to quality, but, by spring, had fallen off 5–8 marks.

There was considerable demand, however, for new Hungarian

and French seed, whilst the American seed, which is of very fine quality, scarcely received any attention. Hungarian seed closed at 8-10 marks higher than opening prices; French and American, about 5 marks higher. Notices were, November, for last year's inland crop, 40-60 marks; last year's French seed, 46-50 marks; new French seed, 53-60 marks; new Hungarian, 58-60 marks; new American, 46-52 marks.

White clover was mostly imported from Bohemia during the winter, as the Pomeranian crops turned out a complete failure, the crops in Silesia also being small, there were, however, some of the old stocks on hand.

Old goods sold for 15-30 marks; new, 30-40 marks. Large offers were made from Bohemia and Moravia, which met with but moderate acceptance during spring, prices being at a lower standard than they have reached for several years. The wet summer, and comparative destruction of the new home crops, however, increased the prices, especially for light last year's seed, from 20-30 marks; and inferior and middle only rose 10-15 marks, so that in November the prices were for best last year's, 60-88 marks; middle, 40-50 marks; and inferior, 25-35 marks.

Yellow clover and Swedish clover also improved in price during the autumn about 15-20 marks.

Timothee seed was scarce in winter, and rose 27-37 marks, according to quality.

There was a large demand for grass-seed, Italian rye, grass, and honey-grass, rose 3-5 marks, and remained during spring without change, but advanced a little during the autumn.

8,946 tons of rape-seed were imported to Stettin during 1888, of this amount 4,119 tons came from the East Indies direct. Last year's (1887) import of rape-seed amounted to 9,435 tons. The linseed imported was 8,286 tons in 1888, against 9,946 tons in 1887. The quantity of other oil-seeds imported in 1888 amounted to 1,470 tons. Ricinus-seed, 594 tons; palm kernels, 387 tons; mustard-seed and poppy-seed, 82 tons.

Oil-seeds and cakes.

The stock of rape-seed on hand at the beginning of the year was 5,323 tons, which was sold off by April; low offers from India, and the favourable reports of the crops, kept the price on an even level of about 200 marks to the end of June, at which price it has steadily remained for the last three years. The crops having, however, not realised the expectation, prices rose on July 22 to 210 marks, and, by the end of September, were at 250 marks, during the latter part of the year only small parcels were in the market, for which the price of 280 marks were asked and paid.

The increased import of oil-cake to Stettin is this year very marked, being 8,541 tons, against 4,525 tons in 1887. From France, arrived 4,015 tons; from Italy, 2,739 tons.

The export was much the same as last year, only showing a slight increase, being 5,793 tons, against 5,065 tons in 1887. This export was mostly to Scandinavian ports. Prices for oil-cake increased during the year from 5 marks 75 pf. to 7 marks 75 pf. per 50 kilos.

Oils and
grease.

By sea, the various kinds of oil and grease imported to Stettin were as follows:—4,075 tons of palm and cocoanut oil, 2,987 tons of linseed oil, 3,824 tons of lard, 4,565 tons of tallow, 2,000 tons of train oil.

Exported, 8,644 tons rape-seed oil, against 8,679 tons in 1887, of which 3,164 tons were shipped to England, and 4,709 tons to Holland and Belgium.

The year commenced with a stock on hand of about 4,500 meter cwt. rape-seed oil, prices at 47 marks 50 pf. per 100 kilos., inclusive of barrel (duty paid), and 44 marks 50 pf. per 100 kilos., inclusive of barrel for transitu oil.

Owing to continual severe weather shipments were rare, the Baltic being covered with ice, and the Sound unnavigable. This, however, does not appear to have had any effect on the depressed prices, as the stock continued to increase by the production of the local mills, and by railway import; in the middle of March prices for duty-paid oil were 44 marks 50 pf., and 42 marks 50 pf. for transitu oil. In April, however, on the opening of the shipping traffic, matters improved; the stock in hand was cleared away, and prices increased, and by the end of June stood at 47 marks 50 pf. (inclusive of barrel) duty paid, and 44 marks 50 pf. (inclusive of barrel) transitu.

This rise was brought about by the unfavourable reports of the harvest and a deficiency in the Indian crops.

In September the price had attained to 56 marks for duty-paid (inclusive of barrel), and 52 marks 50 pf. transitu goods (inclusive of barrel), and by the end of December 60 marks 50 pf., and 54 marks 50 pf. respectively.

EXPORT Table for Rape-seed Oil.

	1888.	1887.	1886.	1885.
Stocks in meter cwt. on the 1 Jan.	4,500	4,850	3,350	3,400
Production of three Stettin mills	77,200	76,800	77,000	72,000
Supply from the inland	8,000	11,000	10,390	7,200
Total in meter cwt. ..	89,700	92,650	90,740	82,600
Exported to :—				
England	34,700	25,900	22,840	29,000
Sweden and Norway	1,800	2,800	2,400	2,400
Germany (Rhine province) ..	32,000	42,850	49,250	36,000
Town and province	12,900	10,200	9,700	10,200
Sundries	6,800	6,400	1,800	1,650
Total in meter cwt. ..	88,200	88,150	85,990	79,250
Stock on hand	1,500	4,500	4,750	3,350

PRICES per 100 kilos. (inclusive) duty-paid on January 1:—

1888.	1887.	1886.	1885.
Mks. Pf.	Mks. Pf.	Mks. Pf.	Mks. Pf.
47 50	44 75	43 50	49 50

the ten years' average was 52 marks 90 pf. per 100 kilos.

The trade done in olive oil in Stettin is insignificant. During Olive oil. 1888 only 311 tons were imported. Prices:—Italian, 33 marks 50 pf.; and 35 marks 50 pf. per 50 kilos., transitu; Malaga, 35 to 36 marks; sweet oil unchanged at 60 to 70 marks. Cotton seed oil rose from 23 marks to 50 pf. to 27 marks, duty-paid.

Lagos fluctuated between 22 marks 50 pf., and 20 marks 50 pf., Palm oil. duty paid, until autumn, then rose to 29 marks and closed at 28 marks 50 pf.

Fell from 24 marks 50 pf. to 22 marks 50 pf., and rose again Palm kernel oil. in latter part of year to 24 marks 25 pf. for duty-paid.

Cochin in hogsheads yield from 35 marks to 31 marks 50 pf., Cocoonut oil. and later rose to 35 marks 50 pf.; the same in puncheons moved between 33 to 30 marks, and 31 marks 50 pf.; Ceylon hogsheads, between 29 marks, 30 marks 50 pf., 28 marks and 30 marks; in puncheons between 27 marks, 27 marks 50 pf., 25 marks 50 pf., and 29 marks.

Russian soap and candle tallow wavered for some time Tallow. between 35 marks and 34 marks 50 pf., duty-paid, then rose to 39 marks, and closed with 38 marks to 38 marks 50 pf.; Australian moved between 26 marks to 29 marks, 28 marks 50 pf. to 30 marks, 26 marks to 28 marks, and 32 marks to 36 marks; New York, between 25 marks to 27 marks, and 24 marks to 27 marks.

Inland Olein hung for a long time between 20 marks and Olein. 19 marks 50 pf., but at the close rose to 24 marks. Russian Newsky rose from 23 marks 50 pf. to 36 marks.

The market for lard was lively. Fairbanks began at 38 marks Lard. to 36 marks 50 pf., and again to 38 marks, transitu; for steam lard between 41 marks, 39 marks 50 pf., and 41 marks 50 pf. The inundations in the German rivers increased the prices, and by October, Fairbanks, 48 marks 75 pf.; standard, 56 marks; subsequently the prices yielded on account of the large American maize crop to 44 marks and 46 marks.

Copenhagen seal train oil yielded from 26 marks 50 pf. duty-Train oil. paid, to 25 marks 50 pf. Brown Berger cost 19 marks to 19 marks 50 pf., and 18 marks 50 pf. Light bright, from 26 marks to 23 marks, and 25 marks 50 pf. Brown bright, 23 marks to 21 marks 50 pf., and up to 25 marks 50 pf.

Linseed oil for ready cash travelled slowly from 23 marks Linseed oil. 50 pf. to 21 marks 50 pf., and then rose to 23 marks 50 pf. again, closing at 22 marks 75 pf.

The import by sea of timber to Stettin in 1888 amounted to Timber. 101,707 tons, against 93,952 tons in 1887. This was composed

of 89 per cent. of sawn timber, which arrived for the most part from Prussian harbours, and was forwarded to the interior. The export of timber increased considerably in 1888, the amount standing at 74,005 tons, against 63,557 tons in 1887. 2,167 tons of oak staves were exported to Sweden; 8,267 tons, mostly for building purposes, to France; 4,049 tons to Belgium; 1,541 tons to Holland; 54,098 tons to England; 765 tons to Portugal.

Petroleum.

The import to Stettin amounted to:—

1888.	1887.	1886.	1885.
Barrels.	Barrels.	Barrels.	Barrels.
318,576	341,112	330,222	297,625

There arrived (by weight), during 1888, 54,321 tons, against 55,943 tons in 1887. From the United States of America came 50,064 tons, and from Russia 1,490 tons.

The import of inferior oil (Schmierölen) amounted to 6,075 tons, against 3,690 tons in 1887. Of this 4,801 tons from Russia, and 792 tons from America.

The stock on hand was on December 29, 1887, 30,771 barrels, and on December 27, 1888, 58,354 barrels. The movements in petroleum had a downward tendency until the end of February from 13 marks to 11 marks 40 pf. (duty-paid), a slight subsequent rise bringing the price up to 13 marks 20 pf. in April, but by May was again at 11 marks 40 pf. to 11 marks 50 pf. The end of June found the price at 11 marks 25 pf., but improved slightly in August, and later, in consequence of higher freights, to 13 marks; October, 12 marks 65 pf.; November, 12 mark 50 pf.; closing at 12 marks 25 pf.

Rosin.

The import of rosin to Stettin in 1888 amounted to 10,856 tons, against 8,771 tons in 1887. Prices remained steady at 3 marks 65 pf. to 3 marks 70 pf. for good strained, and 4 marks 60 pf. to 5 marks 70 pf. for clear; 6 to 10 marks for French, up to September, increasing during that month to 3 marks 50 pf., 4 marks to 5 marks, and 5 marks 50 pf. respectively; in October at 3 marks 75 pf., 4 marks 50 pf. to 6 marks, and 6 marks to 7 marks respectively; good strained rose in December to 4 marks.

Herrings.

The importation of herrings for the last four years is shown by the following table:—

IMPORT Table.

Herrings.	1888.	1887.	1886.	1885.
	Barrels.	Barrels.	Barrels.	Barrels.
Scotch	292,105	310,191	371,954	402,932
Norwegian	130,571	136,653	123,245	108,492
Dutch	11,610	5,876	21,771	13,905
Swedish	9,627	1,295	675	675
French	1,137	..	..	..
Bornholm	1,766	598	1,264	3,031
Total	446,816	504,613	518,810	529,035

1888 again shows a total decrease in the import of herrings by 57,797 barrels in comparison to 1887, and by 71,994 barrels against 1886. Scotch herrings show a decrease in 1888, as compared with 1887, of 18,086 barrels, but against 1886 shows a decrease of 79,849 barrels.

The export shows a corresponding total decrease of 48,140 barrels, in comparison to 1887, and by 82,033 barrels against 1886.

EXPORT Table.

Herrings.	1888.	1887.	1886.	1885.
	Barrels.	Barrels.	Barrels.	Barrels.
Scotch	311,187	332,353	405,553	405,055
Norwegian	143,504	173,928	126,998	85,607
Dutch	10,279	9,600	18,929	15,565
Swedish	6,166	1,295	1,434	1,329
French	1,137	..	297	2,163
Bornholm	1,235	1,222	2,280	1,506
Total	473,453	521,598	555,491	511,230

This decrease is not so much to be wondered at when it is considered that during the years 1884, 1885, and 1886 the imports were abnormally large, and far in excess of the demand. Even the reduction in prices, far below the invoice value of the goods was insufficient to clear the markets. In consequence there have been large stocks of old herrings to be got rid of during the subsequent years, both here as well as inland, which has had, as might be expected, a depressing influence on the trade, this year (1888) having particularly to suffer under the pressure of the old stocks. However, by the time that the new catch began to arrive the old stocks were nearly, if not entirely, cleared away. The autumn business accordingly showed quiet but satisfactory results, and at the close of the year the stock remaining on hand was accounted to be the smallest known during the last 20 years, leaving a good opening for the year 1889.

The amount of Scotch herrings sold during 1888 :—

78,000	barrels old east coast herrings.
17,073½	„ new matties „
216,063½	„ new east coast „
311,137	„

Respecting old east coast herrings, hopes were entertained at the beginning of the year that the old stocks, which contained only 15,049 barrels of 1886, and 53,126 barrels of 1887 (against 90,638 barrels remaining in 1886) would be cleared off at fairly good prices. Some business was done by placing the goods at attractive prices, but the market soon became dull, and Lent passed without any large decrease in the stock on hand. Holders were obliged, therefore, in order to clear off to lower the prices to such an extent that Crown fulls were selling at about one-half

their value, and other brands at two-thirds of their value. By this means the old stocks were by July almost sold off. 1886 Crown fulls sold at from 7 marks to 3 marks.

For 1887 goods prices per barrel (duty unpaid) as per table :—

	Begin- ning of January.	End of						
		January.	February	March.	April.	May.	June.	July.
		Marks.	Marks.	Marks.	Marks.	Marks.	Marks.	Marks.
Crown fulls ...	24 to 30	27 to 30	27 to 29	25 to 27½	22 to 24	18 to 20	14 to 16	13 to 15
Crown matties	17 21	17½ 21	17 19	17 18½	16 18	12 14	11 13	...
Crown mixed...	15 18	15 18	15 17	...	...	...	...	...
Crown ihlen ...	15 18	15 18	15 17	14 ... 16	13 ... 14½	11 ... 13	11 ... 12	...

The sale of matties herrings during 1888 amounted to 17,073 barrels, against 14,273 barrels in 1887.

There was a continued demand for fine large fish, and many purchases were made from ships' sides.

Prime southern salted were from 60 to 80 marks, and in a few cases 90 marks (duty paid), prime Stornoway salted 35 to 50 marks (duty paid), and inferior goods at cheaper rates.

The demand for new Scotch east coast was very lively during the months of July, August and September, with a tendency to increase, but later business became quieter.

It is to be noted with interest that "fulls" had proportionally a larger import than usual in 1888, causing a greater demand for smaller sorts than in some cases could be supplied.

In good sound matties there was also a want felt. The prices (duty paid) in the table following :—

	Begin- ning of July.	End of					
		July.	August.	September.	October.	November.	December.
		Marks.	Marks.	Marks.	Marks.	Marks.	Marks.
Unbranded fulls	33 to 35	30 to 36	23 to 31	26 to 31	22 to 30	22 to 28	22 to 28
Crown fulls ...	...	...	29 35	29 37	27 34	25 33	25 31
Crown matties ...	...	...	23 25	25 29	25 28	24 26	24 26
Crown mixed ...	...	...	...	24 27	23 25	23 25	22 24
Crown ihlen ...	...	...	.21 ... 23	23 26	23 25	23 25	22 24

The sale in Norwegian herrings amounted to 63,634½ tons of old fat herrings, 207 tons of Vaar herrings, and 79,662½ tons of new fat herrings; was smaller than the sale of 1887 owing to the particularly large catch of that year, but is larger, with this exception, than any since 1874.

There was already in January a good demand for old fat herrings, last years stocks being nearly all cleared away towards the middle of March, but as the new supplies could not arrive on account of unfavourable weather business became dull.

After the opening of the ice in the middle of April business became more lively, but the supply of KK and K was often insufficient to meet the wants of the market; towards the end of August the stock had been cleared off. Prices as follows :—

	Begin- ning of January.	End of							
		January.	February	March.	April.	May.	June.	July.	August.
		Marks.	Marks.	Marks.	Marks.	Marks.	Marks.	Marks.	Marks.
KKKK	15 to 17	15 to 17½	16 to 18	17 to 19	19 to 20	19 to 20	...	...	...
KKK ...	18 24	18 24	22 25	22 26	23 27	20 25	20 to 24	20 to 23	19 to 21
KK ...	14 18	14 18	15 19	16 20	17 20	17 20	16 19	16 19	...
K ...	10 12	11 13	12 14	13 16	14 16	14½ 16	15 16	16 16	...

The demand for new fat herrings during the autumn was generally very satisfactory, and prices kept fairly high, with the exception of the two higher brands, for which the offers were too high. Prices per barrel:—

	End of				
	August.	September.	October.	November.	December.
	Marks.	Marks.	Marks.	Marks.	Marks.
KKKK..	..	21 to 24	17 to 19	16 to 18	16 to 18
KKK ..	25 to 31	24 29	19 26	18 25	18 25
KK ..	30 33	28 30	27 30	23 29	23 29
K ..	25 30	27 30	27 29½	22 29	22 29
MK ..	..	18 21	19 22	17 20	16 20

The business done in Dutch, French, and Bornholm herrings has been very limited and offer occasion for no special remarks, but Swedish herrings require more attention, as they are rapidly coming into favour as a substitute for Scotch herrings, more particularly in the latter months of the year. Of great importance also are the fresh Swedish herrings, which, however, are not included in the above table. The stocks left at the end of December, 1888, amounted to:—

Scotch herrings	..	49,144	barrels, against (1887)	..	68,176
Norwegian "	..	24,662½	"	..	37,595½
Dutch "	..	1,755½	"	..	424
Swedish "	..	3,461	"	..	..
Bornholm "	..	596	"	..	65
Total ..	..	79,619	"	..	106,260½

There can be no doubt that the Scotch herring is less in favour than in former times, or perhaps it would be more correct to say that the herrings of other nationalities are beginning to supplant the Scotch in this market, and there can be but little doubt that unless there is an improvement in the attention to the production of Scotch goods, the Norwegian, and more particularly the Swedish herring, will largely interfere with the consumption of Scotch herrings. Scotch production has during the last few years remained stationary, and in some instances fallen back from the original standard, whereas the Norwegian, and latterly the Swedish curers, have been making all endeavours with a large amount of success to improve their trade by preparing their herrings to suit the German markets.

A few points of complaint against Scotch herrings may be mentioned.

First, in the commencement of the season there is a desire to press the first catch as early as possible into the market, this is no doubt a very natural and reasonable wish, but it has given rise to a tendency to pack the barrels before the fish are properly pined or shrunk, whereby the filling of the barrels becomes defective before arrival.

Second, the selection of the fish might be much improved. In the case of branded herrings the brand should *always* be a guarantee for the contents. In the case of unbranded herrings it is difficult to say what can be done, but curers should be careful to send a good and *correct* article under the name that they bear.

Third, a further note might be made that an equal standard in the size of herring barrels should be maintained in order that retail purchasers may be aware, on making purchases, of the average contents of same.

The Swedish, and in many cases, Norwegian curers, are working upon the Scotch system, and at the same time having full cognizance of the defects in the Scotch method, are using their utmost endeavours to avoid them. In several instances Swedish herrings are packed in barrels identical in appearance and material to the Scotch, the packing is equal to the average Scotch filling, and the selection is very carefully attended to, and these herrings are now finding their way into the German markets, to a certain extent as a substitute for the Scotch herring, and I hear that in several cases they have depressed the price and rendered the sale of Scotch branded herrings of 1888 and 1887 more difficult. This, if Swedish fishing continues to hold good, is likely to increase from year to year, unless a strong effort is made by the Scotch curers to improve their position.

It is in no way the attribute of a consular report to enter upon questions that have a tendency towards controversial matter, but it may be pointed out that there appears to be a fairly unanimous opinion here amongst the herring merchants that the periodical visit of one or two of the fishery board officers to this and other centres of the herring trade on the continent might help to place the requirements of purchasers more pointedly before the curers in Scotland.

The import of coffee by sea to Stettin during 1888 amounted to 7,222 tons against 7,204 tons in 1887. From Hamburg, Bremen, and Zollverein ports there arrived 2,609 tons, from France 1,032 tons, from Holland 1,591 tons, and from England 1,655 tons.

Coffee and
southern
fruit.

Rice. To Stettin was imported, in 1888, 13,565 tons of rice, 1,966 tons of which were husked in the local mills.

Notices for Kadang and ff. Java table rice were at 30 marks to 28 marks transitu; ff. Japan, 21 marks to 13 marks 50 pf.; Patna and Rangoon table rice 18 marks to 15 marks; Rangoon and Aracan 14 marks to 11 marks; common, 10 marks to 9 marks 25 pf.; broken rice, 10 marks 50 pf. to 8 marks, at which price the above remained, with the exception of common Rangoon and Aracan closing at 10 marks 50 pf. to 10 marks; and broken rice at 9 marks 50 pf. to 9 marks.

Raisins. Vourla Eleme crops of 1887 fetched at the beginning of the year 18 marks transitu; 1886, 13 marks; 1885, 10 marks. In November for 1887 crop in boxes 12 marks 50 pf.; in bags, 12 marks; 1888, Prima Vourla, in boxes, 16 marks; in bags, 15 marks. By the end of the year prices had decreased to 11 marks 50 pf. for old in bags; for new, 14 marks 50 pf. to 14 marks.

Currants. At the commencement of the year stood at 26 marks 50 pf. in barrels (duty paid), by the middle of March and to the end of April at 27 marks 50 pf., fell a little in the beginning of May to 26 marks 50 pf., but again rose soon to 28 marks, keeping this price until the middle of September, and yielded greatly at the close to 22 marks per barrel.

Almonds. Sweet almonds, Bari, Palma, and Girgenti began at 70 marks (duty paid), Avola 80 marks, Alicante 88 marks, bitter almonds 73 to 76 marks, the latter yielding soon to 72 marks to 74 marks, and Bari, Palmer, and Girgenti to 69 marks, whilst the price for Avola rose to 88 marks; towards the end of June bitter almonds were fetching 70 marks, Bari, Palma and Girgenti 68 marks, prices rose in October, for the former to 81 marks, the latter to 77 marks. In November Bari was 78 marks, Avola 85 marks to 90 marks, Alicante 90 marks, bitter almonds 81 marks, the latter rising at the close to 83 marks, and sweet Bari to 79 marks.

Oranges. Towards the end of February Messina were fetching 14 marks 50 pf. to 15 marks per box.

Lemons. Messina 16 marks 50 pf. to 17 marks (duty paid) rose in March to 15 marks 50 pf. to 16 marks, and 17 marks 50 pf. by April at 16 marks 50 pf. to 18 marks 50 pf., and beginning of June 19 marks 50 pf.

Spices. Pepper (Singapore) commenced at 79 marks (transitu) fell in February to 75 marks, but in consequence of favourable crop reports rose to 77 marks in April. Malabar fetched 75 marks, in the middle of August 76 marks, and at the end of the year 75 marks, while Singapore throughout the year fetched 1 mark 20 pf. per 50 kilos.

All spice (Piemento) commenced "at 27 marks 50 pf. (transitu), for cleaned Piemento 29 marks to 30 marks, in March 26 marks to 28 marks. In October prime Jamaica fetched 32 marks, by the end of the year 31 marks to 34 marks and 34 marks 50 pf. according to quality. Cassia lignea began at 54 marks, February 53 marks, in April 52 marks, June 50 marks, at which price it remained until the close of the year.

Cassia flores in November rose from 75 pf. to 83 pf. for $\frac{1}{2}$ kilo. (duty paid), and remained at that price.

Bay leaves, stationary at 19 marks (duty paid).

Nutmeg, 3 marks 30 pf. to 3 marks 80 pf. per $\frac{1}{2}$ kilo. (duty paid).

Mace rose from 3 marks 70 pf. to 4 marks and from 3 marks 50 pf. to 3 marks 70 pf. (duty paid).

Cinnamon, stationary at 1 mark 30 pf. to 1 mark 80 pf.

Cardamom at 3 marks 50 pf. to 4 marks.

Cloves moved between 1 mark 40 pf. and 1 mark 20 pf. (duty paid).

The wine import to Stettin in 1888 amounted to 48,405 Wine. double centner, against 43,880 double centner in 1887, has therefore an increase of 4,525 double centner in 1888, nearly reaching the import of 1886 of 49,000 double centner. The largest increase has been in French wine, and was caused probably by the report of the wholesome condition of the Bordeaux vintage of 1887, which has been stated to have been unhealthy during the last few years; also the large increase in French wines may be attributed partly to the fact that merchants made large purchases to meet the new tax coming into force in 1887, of which stock in hand much remained unsold until this year; 1887 Bordeaux being of excellent quality, although only a small crop, prices ranged high.

Southern wines of 1887 vintage, being also of good quality, helped to cause the large increase in imports compared with 1887.

The wine export in 1888 amounted to 41,239 double centner, against 41,204 double centner in 1887.

1888 was not a good business year for wines on account of National mourning, the inundations, and the bad attendance at places of amusement and watering places owing to unfavourable weather.

90,404 tons of pig-iron were imported to Stettin during 1888, Iron and metals. against 70,770 tons in 1887; of bar iron 10,564 tons in 1888, against 9,786 tons in 1887; also 2,585 tons of sheet iron, being mostly from England. There were also 54,677 tons of iron ore from Sweden and England, 16,211 tons of sulphur ore from Spain and Portugal, and 34,327 tons of slack for the most part from England. Exported were 9,026 tons of bar iron, the greater part going to Denmark.

Prices were:—

		For English.				For Scotch.			
		Marks	pf.	Marks	pf.	Marks	pf.	Marks	pf.
In January ..	100 kilos.	5	80 to	0	0	7	0 to	7	80
June.. ..	„	4	95	5	25	5	80	6	75
December ..	„	6	50	0	0	7	0	8	0

Owing to the long winter, pig-iron stocks were cleared off in March. Inland bar iron fetching from January to May 14 marks 50 pf., and later 15 marks. Swedish during the same period, 23 (744)

marks to 24 marks 50 pf., and 22 marks 50 pf. to 24 marks (duty paid). Sheet iron plates in the usual trade qualities, 16 marks 50 pf. to 22 marks 50 pf. according to dimension.

Lead. 8,074 tons of lead exported from Stettin in 1888 went almost entirely to England and Russia.

Prices for German white lead here was up to May, 34 marks; June and July, 31 marks to 32 marks; until December, when 33 marks was reached per 100 kilos.; Spanish, Rein and Co., April, 39 marks; May to July, 36 marks; August, 35 marks; December, 36 marks per 100 kilos.

Zinc. The export in 1888 from Stettin amounted to 26,424 tons, the greater part to England. Zinc sheet plates in January were 49 to 51 marks; in July, 41 marks; and in December, 41 marks per 100 kilos.

Tin. Banca tin went up from 335 marks to 340 marks, to 350 marks in April, fell, owing to the withdrawal of English and French financiers, in one day, to 280 marks; July and August price was 220 marks, and at the close stood at 230 marks.

Copper. The notices in January were 180 marks, June and July 170 marks, September and December 190 marks per 100 kilos.

Coals and coke. The import of coals and coke to Swinemünde and Stettin has amounted to—

						Tons.
In 1885	..	..	..	..	..	459,277
1886	..	..	..	..	..	530,199
1887	..	..	..	..	..	480,078
1888	..	..	..	..	..	485,001

and would without doubt have been larger had it not been for the rise in sea freights.

The supply of Silesian coals by train amounted to 3,000 tons more than last year (1887) which was 12,728 tons. The long continuance of the frost, and the rise in freights from England, greatly influenced the increase. Prices for coals were:—

				In January.		Middle of March.		End of March.	
				M. pf.	M. pf.	M. pf.	M. pf.	M. pf.	M. pf.
Large Scotch	...	...	Last	42 00	to 43 00	43 00	to 44 00	43 00	to 44 00
Smithy coals	...	...	"	40 00	42 00	42 00	45 00	42 00	45 00
Double screened nut	...	...	"	38 00	40 00	40 00	41 00	40 00	41 00
Steam, small	...	...	"	30 00	32 00	31 00	33 00	34 00	36 00
Sunderland Silkworth peas	...	...	"	...	...	...	...	...	...
Silesian coals	...	...	50 kilos.	0 76	0 78	0 77	0 81	0 77	0 81
Brown coals	...	...	"	0 70	0 80	0 72	0 82	0 72	0 80

				In April.		In August.		End of October.		November and December.	
				M. pf.	M. pf.	M. pf.	M. pf.	M. pf.	M. pf.	M. pf.	M. pf.
Large Scotch	...	...	Last	43 00	to 44 00	43 00	to 44 00	46 00	to 48 00	46 00	to 48 00
Smithy coals	...	...	"	45 00	46 00	43 00	44 00	...	...	...	...
Double screened nut	...	...	"	40 00	41 00	38 00	39 00	42 00	43 00	42 00	43 00
Steam, small	...	...	"	27 00	29 00	27 00	29 00	34 00	36 50	32 00	33 50
Sunderland Silkworth peas	...	...	"	...	...	...	...	48 00	...	...	...
Silesian coals	...	...	50 kilos.	0 77	0 81	0 77	0 81	0 72	0 80	0 72	0 80
Brown coals	...	...	"	0 72	0 80	0 65	0 70	0 55	0 65	0 60	0 70

Annexed to this report will be found a list of the number of registered German ships belonging to Stettin since the year 1862 to 1888, which is interesting as showing the increase of steam and the decrease of sailing vessels, Table A. Table B, statistics of the number, tonnage, and crew of all British ships that have arrived at the ports of Stettin and Swinemünde from the year 1857 subsequent to the removal of the Sound dues, to the year 1888, which shows how steadily the tonnage has increased since that date. Table C is a statistical list of vessels of all nationalities including coasting vessels which have entered the port of Stettin from the year 1865 to 1888.

Freights for steamers and sailing vessels were in spring at moderate terms, but increased considerably after the long winter in all the Baltic ports; especially in the Russian, Swedish and Finnish harbours, a thriving demand showed itself for steamers and sailing vessels.

THE FREIGHTS FOR STEAMERS WERE IN SPRING (APRIL INCLUSIVE):—

				1888.	1887.
London..	..	Zinc ..	.. Ton ..	6s.	5s.
" ..	..	Sugar..	.. " ..	8s., 8s. 6d.	7s. 6d.
Hull ..	..	Zinc ..	.. " ..	6s.	6s. 5d.
" ..	..	Sugar..	.. " ..	9s.	7s., 6s. 6d.
Leith ..	..	" ..	.. " ..	9s.	7s., 6s.
" ..	..	Grain..	.. Quarter ..	1s. 9d., 2s.	1s. 3d.
Rotterdam	..	Flour..	.. 1,000 kilos	10 mks., 8 mks.	6 mks.
" ..	..	Wheat ..	.. "	9 mks., 7½ mks.	6 mks., 5½ mks.
Amsterdam	..	Flour..	.. "	10 mks., 8 mks.	8 mks., 7½ mks.

Freights kept up during the usually dull summer period.

THE RATES WERE (INCLUDING AUGUST).

				1888.	1887.
London..	..	Zinc ..	.. Ton ..	5s. 6d.	5s.
" ..	..	Sugar..	.. " ..	7s. 6d.	7s.
Hull ..	..	Zinc ..	.. " ..	5s. 6d.	5s.
" ..	..	Sugar..	.. " ..	9s., 8s.	7s.
Leith ..	..	" ..	.. " ..	9s.	6s. 6d., 7s.
" ..	..	Grain..	.. Quarter ..	1s. 6d., 1s. 9d.	1s. 3d.
Rotterdam	..	Flour..	.. 1,000 kilos	8 mks., 9 mks.	5 mks., 5½ mks.
" ..	..	Wheat ..	.. "	7½ mks. 8½ mks.	5½ mks.
Amsterdam	..	Flour..	.. "	8½ mks.	7 mks.
Stockholm	..	" ..	.. "	8 mks.	4 mks.

During autumn the freights came up higher, and remained so until the end of the year.

				1888.	1887.
London..	..	Zinc ..	.. Ton ..	6s. 6d.	5s.
" ..	..	Sugar..	.. " ..	8s., 10s.	7s., 8s.
Hull ..	..	Zinc ..	.. " ..	8s.	5s., 7s.
" ..	..	Sugar..	.. " ..	10s., 11s.	7s., 9s.
Leith ..	..	" ..	.. " ..	9s., 10s.	6s. 6d., 9s.
" ..	..	Grain..	.. Quarter ..	1s. 9d., 23d.	1s. 3d., 1s. 6d.
Rotterdam ..	..	Flour..	.. 1,000 kilos	10 mks.	6 mks., 9 mks.
" ..	..	Wheat ..	.. " ..	9 mks., 9½ mks.	6 mks., 8 mks.
Amsterdam ..	..	Flour..	.. " ..	10 mks., 13 mks.	9 mks.
Stockholm ..	..	" ..	.. " ..	5 mks., 9 mks.	5 mks., 6 mks.
Sundsvall ..	..	" ..	.. " ..	5 mks., 9 mks.	5 mks., 7 mks.

The trade with the Baltic harbours became more favourable, and higher freights were granted for grain and timber cargoes.

The great rise in coal freights from 4s. 6d. up to 8s. 6d. per ton in autumn, caused many German steamers to visit the English coal harbours.

Steamers from this to Spanish ports have lost much of their former regularity, in consequence of the changed condition in Spanish custom dues.

The number of offers for sailing vessels at this port were during summer very small, in consequence freights were higher.

The freights for timber and molasses were as follows:—

IN Spring (including April).

				1888.	1887.
London..	..	Oak plançons	Load ..	11s.	8s. 6d.
" ..	..	Fir timber ..	" ..	8s.	7s., 6s.
Hull ..	..	Oak plançons	" ..	8s. 6d.	7s. 6d.
" ..	..	Fir timber ..	" ..	6s. 6d.	6s. 6d.
Hartlepool ..	..	Oak plançons	" ..	9s., 10s.	7s., 6s. 9d.
Grangemouth ..	..	Fir timber ..	" ..	6s. 3d., 7s.	5s. 6d.
Dundee..	..	" ..	" ..	7s. 3d., 7s. 6d.	6s. 6d.
Liverpool ..	..	" ..	" ..	10s.	8s.
Bristol ..	..	Oak plançons	" ..	14s., 15s. 6d.	10s. 9d.
Rocheport ..	..	Fir timber ..	Last ..	21 fr., 15 p.c. prim.	18 fr., 16 fr.
St. Nazaire ..	..	" ..	" ..	20-22 fr.	16 fr.
Bordeaux ..	..	" ..	" ..	21½-23 fr.	18 fr.
Dunkerque ..	..	Molasses ..	2,000 kilos.	19 fr.	16½ fr.

DURING the Summer (including August).

			1888.	1887.
London ..	Oak plançons	Load ..	12s. 3d., 14s.,	8s. 6d., 10s.
" ..	Fir timber ..	" ..	8s.	6s. 6d., 7s. 6d.
Hull ..	Oak plançons	" ..	11s., 12s. 9d.	8s. 3d.
Hartlepool ..	" ..	" ..	9s., 10s.	6s. 9d., 9s.
Honfleur ..	" buttends	Last ..	23 fr., 15 p.c.	19 fr.
Dunkerque ..	Molasses ..	2,000 kilos.	19 fr., 22½ fr.	16 fr.
Bordeaux ..	" ..	" ..	24 fr., 32 fr.	22 fr.

FROM September to the end of the Year.

			1888.	1887.
Hartlepool ..	Oak plançons	Load ..	13s., 14s.	9s., 14s.
Grangemouth ..	Fir timber ..	" ..	10s., 10s. 8d.	7s. 6d., 7s. 9d.
Aberdeen ..	" ..	" ..	11s.	8s., 8s. 6d.
Bristol ..	Oil ..	Ton ..	15s.	12s. 6d.
Dunkerque ..	Molasses ..	2,000 kilos.	24 fr.	17 fr., 25 fr.

The Neue Dampfer Company report:—After the late severe winter the traffic between here and Swinemünde was opened in the beginning of April, but even then our Baltic steamers could not commence trade, because those harbours with which we maintain regular lines were still frozen up. Such a late opening of shipping as that of last year has not been known for a long time. The first steamers reached Dantzic on April 10, Königsberg on April 15, Stockholm and Reval on May 1, and St. Petersburg on May 10. Our North Sea steamers, which are busy during the winter voyages between the east and North Sea, were interrupted by the Drogden Sound and Kattegat being covered with solid ice from the beginning of March to April 9, and the traffic was entirely blocked between the Baltic and North Sea. During this time eight of our steamers have been shut up in different Norwegian harbours, Elsinor and Copenhagen.

The iceblock between Swinemünde and Stettin is luckily diminished; by the building of two ice breakers we could continue to move our steamers from Stettin during the whole winter.

To enlarge our fleet we have ordered the construction at the "Vulcan" works of one steel spardeck steamer of 1,600 reg. tons (exclusive coals), she will be ready for delivery by April.

In 1888, 14 steamers, with 21,078 tons of merchandise, sailed from Stettin to New York, and 13 steamers, with 7,090 tons of Hamburg-merchandise, arrived from New York in Stettin, whilst 11,156 tons of American packet boats: were discharged at Copenhagen. There were forwarded to New Action com-pany. York, in 13 steamers, 3,078 persons, and 284 persons arrived in Stettin from New York.

The management of the factory report, as follows:—

Delivered—

1. In shipbuilding, the cruiser corvette "Irene" for the Imperial German Navy, the two paddle steamers "Ladario" and

The "Vulcan" ship-building and machinery works.

"Diamantino," also the twin screw-steamer "Laguna" for Brazil, the two ice breakers "Swinemünde" and "Stettin" for the Stettin Corporation of merchants.

2. In general engine construction—besides engines and boilers for the ships delivered and still in the course of construction—were made and delivered, one large ship's engine, 16 compound steam engines of different dimensions for electric purposes, 4 ship's boilers, 7 stationary boilers.

3. In locomotives, there were 34 locomotives delivered to order. In this branch we are happy to state, that in the course of last year a pleasing change has taken place, in so far as, by increasing want, prices became better, and large orders were accepted by the end of the year, which will leave a moderate profit.

The iron floating dock was used by 73 ships.

The invoice value during the year for construction and delivery amounts to 6,997,105 marks 55 pf., equal to 146,917*l*.

In 1888 was paid for insurance, 37,061 marks 70 pf., equal to 1,816*l*. 15*s*.

The fabrics used—

				Quantity.			
				Kilos.	Tons.	Cwts.	Lbs.
Pig-iron	..	..	2,593,494	2,552	11	90	
Bar iron	..	..	1,531,251	1,507	2	54	
Façon iron	..	..	859,858	846	5	84	
Iron plates	..	..	1,625,221	1,599	11	32	
Steel plates	..	..	7,585,492	7,466	0	72	
Angle and bulb steel	..	..	3,562,710	3,508	10	108	
Tool steel	..	..	36,549	35	17	74	
Iron smithy pieces	..	..	88,430	87	0	76	
Steel smithy pieces	..	..	334,924	329	11	88	
Raw copper	..	..	121,092	119	3	40	
Bar copper	..	..	14,728	14	9	0	
Copper plates	..	..	128,704	126	12	32	
Tin	..	..	25,191	24	14	46	
Lead	..	..	9,176	9	0	64	
Zinc	..	..	79,065	77	14	98	
Coals	..	..	17,585,890	17,259	13	33	
Coke	..	..	3,083,700	3,035	2	56	

And employed 41 different steam engines, together 1,115 h.p., and 14 different hammers together 218 centners. The company divides out of the net profit about 628,000 marks, or, at the rate of 20 marks 40 pf., to the 1*l*. 30,784*l*. 6*s*. 4*d*., or 6 per cent. dividend.

Müller and
Holberg ship-
building and
machinery
works.

These works employed in 1888 an average of 470 men, of these 188 men were employed in the engine manufactory, and 282 men on the wharf.

396,481 marks 45 pf., or 19,435*l*. 7*s*., were paid for labour, an average per man of 25.88 pf., against 25.19 pf. per hour in 1887.

The establishment paid 6,802 marks, or 14.47 marks per head, for contribution to the infirmery and accident indemnification.

Used on raw materials and half fabricates for the foundry:—

						Tons.
Foreign pig iron	..	..	..	..	..	301
Inland "	..	..	..	..	..	105
Broken iron and steel	..	..	..	..	..	194
Total	..	..	..	..	..	600

out of which came forth 548 tons of foundry iron.

On engines and shipbuilding were used—

	Quantity.			
	Kilos.	Tons.	Cwts.	Lbs.
Bar iron	293,935	2,893	0	94
Façon and angle iron	133,167	131	1	30
Steel angles	102,318	100	12	92
Iron and steel plates	926,640	912	0	96
Steel and smithy pieces	30,568	30	1	64
Copper, brass, and metal in plates, and pipes	10,000	9	15	32

5,200 pieces of sundry boiler pipes; 18,525 kilos., or 18 tons 5 cwts. 74 lbs., of copper, zinc, tin, and bronze, for foundry purposes.

Sundry timber in value of 70,000 marks, equal at 20 marks 40 pf. to the 1*l.* to 3,431*l.* 7*s.*

Amount of fuel materials—

	Quantity.	
	Hectolitres.	Tons.
Coals	22,133	1,676
Coke	11,702	3,218
Wood and coal	3,514	966

1,643 marks equal to 80*l.* 1*l.*s. for wood and turf.

The wharf constructed and delivered:—One passenger screw steamer of steel with compound engine of 70 indic. h.p.; one passenger screw steamer of steel with compound engine of 80 indic. h.p.; one screw tug steamer of steel with compound engine of 150 indic. h.p.; one freight screw steamer of steel with compound engine of 70 indic. h.p.; one freight screw steamer of steel with compound engine of 235 indic. h.p.; one screw tug steamer of steel with compound engine of 150 indic. h.p.; one screw tug steamer of steel with compound engine of 45 indic. h.p.; one freight screw steamer of steel with compound engine of 265 indic. h.p.; two passenger twin screw steamers of steel with two compound engines each of 130 indic. h.p.; four iron Oder tug lighters at 8,000 cwts.; one iron transport lighter 8,000 cwts.

The passenger screw steamer "Germania" and "Wansee" were lengthened. 28 steamers were on the slip for repairs, besides these, 63 steamers were on the wharf under sundry repairs.

Further were delivered:—four ships' engines, and four ships' boilers, six diverse stationary steam engines, and 10 steam boilers for factory purposes; one water and seven spirit reservoirs, eight different pumps, one firing contrivance, and sundry works for sugar, cement, oil, grease, and chemical factories.

The year's return amounted to about 1,000,000 marks, at 20 marks 40 pf. to the *l.*, equal to 49,019*l.* 12*s.*

Until the beginning of the summer there was only a moderate amount of work on hand which after that time increased rapidly, so that by the end of the year the factory and wharf were entirely occupied, and often were obliged to work at night.

The highest number of labourers employed was 639.

By the end of the year 16 ships were on the slip for repair, 23 passenger, one ferry, and one tug screw steamer, were in the course of construction; whilst the machine factory had a great number of ships and stationary steam engines, besides the necessary boilers, in the course of construction.

The iron foundry, machine manufactory, and shipbuilding yard of Aaron and Gollnow, employed in the beginning of the year 523, and in the end of the year 642 labourers. Wages paid were 551,706 marks 43 pf., at 20 marks 40 pf. to the *l.*, equal to 27,044*l.* 8*s.* 8*d.*

Materials used were:—

	Quantity.			
	Kilos.	Tons.	Cwts.	Lbs.
Wrought iron	772,900	760	18	24
Steel and steel plates	86,925	85	10	10
Pig and broken iron	768 400	756	5	48
Copper, brass, red cast lead, tin, and zinc	37,923	37	5	102
zinc	64,978	63	17	36
Coke	566	566		

And employed in their workshops 4 steam engines, together 50 nominal h.p.

In the course of the year were delivered:—8 screw steamers, "Biene IX," X, XI, and XII, "Meta," "Anna," "Erich," and "Otilie"; four paddle steamers "Ente," "Lauenburg IV," "Ludwig IV," and "Robert," together of 2,231 indic. h.p.; two compound ships' engines together of 140 indic. h.p.; one machine contrivance for a pump dredge; six iron mud lighters (self-discharging); two iron launches.

For industrial purposes were delivered:—four mechanical contrivances for other factory purposes, such as grinding and saw mills, tile presses, clay cutters, gas stove armatures, steam pumps, ventilators, and field forges, also in ships and other repairs, the factory was largely employed.

For 1889 there remained in the course of construction:—three

paddle steamers, one after paddle steamer, four screw steamers, three steam dredges, three iron lighters, seven steam contrivances for steam lighters, and two steam tile contrivances, with engines, together of 3,276 indic. h.p.

The number of labourers employed increased from 330 men in 1887 to about 400 men in 1888. The wages have been satisfactory and remained unchanged.

The year 1888 has been a very favourable one in the cement industry, although the business has been, at times, prejudiced through the spring inundations, want of ships and lighters, and increased freights. In the second part of the year the high coal rates raised the price for produce. The increased demand for cement for fortification, canal construction, sluices, and other buildings in the interior, together with the demand from abroad, has caused very important extensions of the cement manufacture.

Have found for their higher priced cement good markets. On labourage in the factory, as also on their lime works, were paid about 430,000 marks, or 21,078*l.* 8*s.* 7*d.*, and paid a dividend of 27 per cent.

Have found a market, in spite of a moderate increase of prices, for almost their whole year's produce of 200,000 barrels, partly in the inland, partly to Denmark, England, America and Australia; but the export to Russia and Austria has been limited to an inferior quantity, compared with former years, on account of the higher import duty. They had sufficient labourers, and their wages remained unchanged; they employed on an average about 550 labourers.

The year's return in Stettin amounted to 1,783,336 marks, or 87,416*l.* 13*s.* Manufactured were 6,936 retorten, 6,100 tons faoned stones, 2,945 mille chamotte stones, 1,411 tons of chamotte mortar. They used 10,265 tons of coals and coke, and used raw materials amounting to 25,400 tons. The factory employed an average of 410 workmen, and paid 263,300 marks, or 12,906*l.* 17*s.* for labour.

The sales of this year have far surpassed those of 1887, partly again on the ground of important military buildings in Germany, also on account of the low prices of raw materials. The labour has a little increased in price; there was an average during the summer of 3 marks, and in winter of 2 marks 25 pf.

The Stettin Steam Mills Company ground at their two mills, which began work on April 4, 1888:—

Year.				Wheat.	Rye.	Total Grain.
				Tons.	Tons.	Tons.
1888	..	..	..	11,878	32,079	43,957
1887	..	..	..	..	..	42,087
1886	..	..	..	..	..	38,561
1885	..	..	..	..	..	37,750

And exported:—

FLOUR.

	By Sea.	By Train.	By River.	Total.
	Cwts.	Cwts.	Cwts.	Cwts.
Abroad	302,656	..	..	302,656
Inland	174,260	2,082	60,962	237,304
Grand total	..	..	..	530,960

BRAN.

	By Sea.	By Train.	By River.	Total.
	Cwts.	Cwts.	Cwts.	Cwts.
Abroad	19,035	..	..	19,035
Inland	17,594	16,913	232,216	266,723
Grand total	..	..	..	285,758

Total exported in 1888..	..	..	..	..	Cwts.	825,718
" 1887..	..	..	..	..	..	697,194
" 1886..	..	..	..	..	..	729,632
" 1885..	..	..	..	..	..	608,176

The company paid $13\frac{1}{2}$ per cent. in dividend, against $6\frac{2}{3}$ per cent. in 1887.

The Stettin
Walz mill.

The Stettin Walz mill ground, in the course of the year 1888, 31,677 $\frac{1}{2}$ tons of grain, against 28,840 $\frac{3}{10}$ tons in 1887.

EXPORTED.

	By Sea.	By River.	By Land.	Total.
	Cwts.	Cwts.	Cwts.	Cwts.
Flour	356,180	13,745	20,510	390,435
Bran	2,500	101,753	103,938	208,191
Grand total	..	..	..	598,626

against 562,777 cwts. in 1887, and 523,693 cwts. in 1886.

The grain mill
of A. H. Zander.
The oil mill
of A. H. Zander.

The company paid a dividend of 30 per cent.

The grain mill of A. H. Zander ground 10,900 tons of rye, and exported thereof 5,372 tons of flour.

The oil mill of A. H. Zander manipulated 8,200 tons of oil-seed, turned out 2,939 tons of rape-seed oil, and of 5,000 tons of oil-cakes. Exported 1,674 tons of rape-seed oil, and 1,902 tons of cakes. For labourage in the two mills were paid 77,530 marks, or 3,310*l.* 6*s.*

The oil mill
of Wm.
Dilger.

The oil mill of Wm. Dilger worked, in 1888, 10,735 tons of oil-seed, against 10,017 tons in 1887. They manufactured 4,025 tons of rape-seed oil, and 6,175 tons of oil-cakes. By the end of the year there was no stock on hand, but the fabric had a good

stock of rape-seed. The number of labourers are the same, but in July by the commencement of the new season the number of labourers had to be increased about 10 per cent., and in the course of the year 70,800 marks, or 3,470*l.* 12*s.* were paid for labour.

The Pomeranian Provincial Sugar Refinery reports:—

Sugar works.

The sugar business in 1888 was very often disturbed by the introduction of the new sugar duties, causing many interruptions to manufacturing, connected with the necessary changes required, which also caused pecuniary disadvantages.

The total raw sugar produce of the company in 1887–88 remains behind former years, in spite of the good sugar produce from the beetroot.

The price of raw and refined sugar retrograded from the commencement of the year until the beginning of June, from which time a little increase took place, but the price of raw sugar remained on the introduction of the new season at about 1 mark lower, as compared with the beginning of the year.

The new season brings with it the altered price notices, in accordance with the new duty changes.

For highly polarised corn sugar 92 rendement per 100 kilos. was paid.

	Marks pf.						
January	50	00					
February	48	50					
March	48	00					
April	46	00					
May	46	00					
June	46	50					
July	47	70					
August	48	00					
September	37	00					
October	35	00					
November	36	00					
December	35	00					

This refinery manufactured, in 1888, 349,000 cwts. of raw sugar, against 354,000 cwts. in 1887, and sold 334,000 cwts. refined, against 314,000 cwts. in 1887.

Employed in the factory were 376 workmen and women, against 366 in 1887, and were paid for labour 301,448 marks 29 pf., or 14,776*l.* 17*s.*, against 296,857 marks, or 14,110*l.* 13*s.* in 1887. The company declared a dividend of 20 per cent.

The chicory factory of J. G. Weiss reports:—The increase of Chicory price which made itself felt in the autumn of 1887 on the chicory market was in consequence of the unfavourable harvest, and has continued during the year 1888. 70 workmen and women were employed, and 41,000 marks, or 2,010*l.*, were paid for labour.

The chemical factory of Pomerensdorf used, in 1888, 74,821 tons of raw materials and fuel, against 72,380 tons in 1887, with a result of 50,862 tons of output, against 50,747 tons in 1887. Chemical works.

The invoiced value amounted to 4,264,527 marks, or 209,045*l.* 10*s.*, against 4,090,349 marks, or 200,507*l.* 6*s.* in 1887.

Employed 720 workmen at the same rate of wages as last year, and declared a dividend of 10 per cent.

The Union
fabric of
chemical pro-
duce.

The Union reports:—The demand for manure during the year 1888 was very considerably increased, not only did the output of superphosphate equal that of 1885, which was the largest market yet known, but exceeded it by some thousand cwts., whilst the market of ground phosphate was double as large.

The produce of sulphuric acid was 1,163 tons larger than in the former year, and that of ground phosphate about 9,138 tons larger.

The factory exported 35,951 tons in manure and acids, representing a value of 2,325,904 marks 40 pf., or 114,015*l.*, against 25,349 tons at 1,888,142 marks 80 pf., or 92,556*l.* in 1887, and declared a dividend of 9 per cent.

Clothing
manufactory.

The total sale of ready-made clothing has surpassed the year 1887, by 1,500,000 marks, or 73,529*l.* 10*s.*, and the increase appears to be entirely in children's clothes.

This industry is carried on with great energy in Stettin, and is likely to become a very important business. The greater part of the work is done by women.

Table A.—SHIPS Registered as belonging to Stettin.

Year.	Steam. Ships.	Tonnage.	Sailing Ships.	Tonnage.	Total of Ships.	Total of Tonnage.
1862 ..	18	..	167	..	185	..
1863 ..	18	..	171	..	189	..
1864 ..	17	2,002	169	40,747	186	43,749
1865 ..	18	3,469	165	40,969	183	44,438
1866 ..	18	3,469	163	40,738	181	44,257
1867 ..	18	3,730	155	39,172	173	42,902
1868 ..	18	3,663	156	40,230	174	43,893
1869 ..	19	4,008	165	40,174	174	44,182
1870 ..	18	3,472	161	42,982	179	46,454
1871 ..	21	5,817	157	42,190	178	48,007
1872 ..	24	7,387	152	41,695	176	49,082
1873 ..	30	11,107	148	40,202	178	51,309
1874 ..	29	9,378	137	38,199	166	47,577
1875 ..	23	6,316	133	37,736	161	44,052
1876 ..	31	7,742	125	36,646	156	44,388
1877 ..	30	7,674	123	35,648	152	43,322
1878 ..	33	8,978	119	34,336	152	43,314
1879 ..	34	9,848	107	30,605	141	40,453
1880 ..	39	13,856	97	28,618	136	42,474
1881 ..	44	17,334	89	26,832	133	44,166
1882 ..	45	18,175	77	24,318	122	42,493
1883 ..	49	19,938	68	21,629	117	41,567
1884 ..	56	25,373	66	20,944	122	46,317
1885 ..	59	26,753	68	20,312	127	47,065
1886 ..	58	23,538	63	18,715	121	42,253
1887 ..	60	24,257	51	15,856	111	40,113
1888 ..	64	25,230	36	11,641	100	36,841

Table B.—NUMBER, Tonnage, and Crew of British Vessels arrived at Stettin and Swinemünde from 1857 to 1888.

Year.	Stettin.				Swinemünde.			
	Steam Ships.	Tonnage.	Crew.	Sailing Ships.	Tonnage.	Crew.	Sailing Ships.	Tonnage.
1857	133	44,336	2,414	453	53,360	2,923	153	34,712
1858	116	38,189	2,054	294	36,132	1,613	139	23,056
1859	94	31,090	1,597	185	19,031	850	113	25,037
1860	86	33,568	1,549	175	18,070	850	118	25,856
1861	153	59,181	2,723	243	30,515	1,334	99	22,569
1862	127	62,689	2,411	320	36,262	1,637	147	23,980
1863	143	63,185	2,721	284	30,133	1,400	128	23,962
1864	80	34,441	1,444	192	20,387	938	106	24,555
1865	129	61,702	2,349	280	27,787	1,253	209	49,656
1866	137	63,631	2,466	286	26,096	1,253	167	41,077
1867	130	68,395	2,166	293	24,096	1,253	109	25,826
1868	239	114,418	4,137	319	34,966	1,553	109	25,826
1869	262	133,263	4,657	233	30,744	1,356	481	21,213
1870	179	91,001	3,225	290	36,471	1,427	103	24,944
1871	267	141,217	4,853	372	49,045	1,956	131	34,544
1872	202	162,667	5,473	284	32,625	1,333	76	20,477
1873	298	170,583	5,561	304	36,074	1,482	43	12,740
1874	289	164,332	5,399	267	30,649	1,309	88	10,161
1875	237	142,335	4,376	244	23,599	1,200	21	7,182
1876	204	126,511	3,972	199	26,401	1,004	23	6,089
1877	201	130,322	3,972	204	26,401	1,004	18	6,089
1878	259	132,772	4,227	203	23,593	1,032	6	1,573
1879	409	205,015	6,456	181	19,013	1,326	180	116,855
1880	410	212,734	6,642	234	25,134	1,098	138	105,605
1881	304	170,612	5,250	180	20,005	1,032	138	94,246
1882	263	147,888	4,505	155	17,033	885	170	120,151
1883	331	213,330	5,560	171	22,344	1,043	187	134,137
1884	350	252,474	6,830	146	17,674	835	190	141,582
1885	317	253,228	6,189	137	16,862	783	185	153,634
1886	303	238,433	5,814	88	14,871	561	215	153,634
1887	339	293,433	6,514	84	14,871	561	215	153,634
1888	363	337,109	6,012	106	17,463	630	206	151,552

NUMBER of all Ships which Entered and Cleared at the Port of
Stettin and Swinemünde from and to Great Britain, with the
Import and Export from and to Great Britain.

Year.	Number of Ships Entered.	Number of Ships Cleared.	Import.	Export.	Remarks.
			Tons.	Tons.	
1857	1,219	840	275,045	85,834	Sound dues were re- moved in the previous year, 1856.
1858	859	411	209,218	57,754	
1859	667	462	162,063	60,358	
1860	694	600	173,402	113,774	
1861	946	554	251,902	29,132	
1862	926	744	204,800	30,038	
1863	1,050	733	253,126	39,554	
1864	473	442	118,038	21,895	Danish War.
1865	830	589	232,361	28,391	
1866	742	687	180,461	198,861	Austrian War.
1867	792	608	190,452	185,801	
1868	926	685	264,807	227,360	Large grain business.
1869	898	636	277,323	211,081	
1870	761	325	223,536	73,833	French War.
1871	1,177	399	400,697	73,708	" "
1872	1,031	466	7,361,046	1,890,324	
1873	1,117	497	5,917,773	1,452,501	
1874	986	393	231,742	53,654	
1875	1,049	303	246,077	67,858	
1876	866	361	257,969	50,734	
1877	933	479	247,467	119,422	
1878	919	462	263,150	138,266	
1879	946	469	272,734	156,771	
1880	1,149	647	379,274	147,662	
1881	912	440	323,986	100,262	Depression in trade.
1882	963	390	321,927	101,977	
1883	1,039	448	392,930	126,703	
1884	946	420	403,029	90,056	
1885	1,050	486	417,727	145,355	
1886	1,007	427	424,154	148,344	
1887	956	415	407,956	182,597	
1888	927	389	438,603	157,045	

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GERMANY.

PRELIMINARY REPORT FOR THE YEAR 1889
ON THE
TRADE OF THE CONSULAR DISTRICT OF STETTIN.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 603.

*Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1890.*

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612. Bilbao	1d.	673. Syra	1d.
613. Barcelona	1d.	674. Boulogne	1d.
614. Tokio	1d.	675. Taganrog	2d.
615. Naples	2½d.	676. Wuhu	1d.
616. Batoum.. ..	1d.	677. Batoum.. ..	1d.
617. Odessa	1d.	678. Manilla	1d.
618. La Rochelle	1d.	679. Tamsui	1d.
619. Rome	1d.	680. Kiungchow	1d.
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HARBOUR PROJECT
ON THE SPACE BETWEEN THE
TOWN OF STETTIN
AND THE
BRESLAU RAILWAY STATION



PROJECT
BETWEEN THE
STETTIN
THE
WAY STATION



No. 682.

Reference to previous Report, Annual Series No. 603.

GERMANY.

STETTIN.

Consul Powell to the Marquis of Salisbury.

My Lord,

Stettin, March 18, 1890.

I HAVE the honour herewith to enclose my Preliminary Report on the Shipping and Commerce of Stettin and the Province of Pomerania for the year 1889, pending the completion of my Annual Report for the same year.

I have, &c.

(Signed) WILFRED POWELL.

Statistical Returns for the Shipping and Commerce of Stettin and the Province of Pomerania for the Year 1889. (Preliminary.)

A steady increase in shipping has been maintained at the ports of Stettin and Swinemünde during the year 1889: the total increase in the number of ships of all nations visiting these ports during the year in sailing vessels amounts to 33 and steamships 429, with an increase of tonnage for sailing vessels of 8,201 tons, and for steamers 201,805 tons.

From the above increase of shipping of all nations, the British flag takes the share of 25 vessels, and an increase of 33,353 tons, as compared with the year 1888. One of the principal causes of this advance in shipping is undoubtedly to be attributed to the opening of the river and "Haff" during the winter months by the ice-breakers, which have succeeded admirably in the work they had to do. It has been calculated that next year, in consequence of the open river, an increase of 25 per cent. in shipping may be expected.

The serious want of quay room for shipping has caused the town authorities to determine on a large development of the harbour, to be carried into effect immediately: a plan (of which a copy is annexed) has been prepared, and work will begin as soon as possible. The new harbour will have quay room of about 4½ kilom., or about 15,000 feet English measurement, being

constructed with two arms, the westerly one connecting with the Parnitz river, giving another entrance to the upper harbour on the River Oder; this will have a special advantage for vessels loading from lighters. A large space will be left between the two arms of the new harbour for warehouses—a proposal having been made that these should be bonded stores, and thus enable ships to work at all hours discharging and loading, which they are not at present able to do in consequence of the customs restrictions. This proposal, however, has not yet received the sanction of the authorities.

Canalisation.

There has been a suggestion from influential persons that a deep water canal from Stettin to Berlin would be of great advantage to the latter city. Permission has been given for surveys and estimates to be made with a view to ascertaining the cost of this project, but it appears doubtful to many persons of experience whether it would ever become a paying concern. A far more likely and important project for the port of Stettin is the proposed deepening of the River Oder and the "Haff" from Swinemünde to Stettin to a uniform depth of 21 feet. This would enable large steamers to come direct to Stettin without discharging any portion of their cargoes in Swinemünde, as is at present the practice. Further, it would be a great benefit to the Vulcan and other large shipbuilding works at this port, which have to despatch their newly-launched men-of-war and other large vessels to Swinemünde without the heavier fittings, in order to get them down the river at all. This will, no doubt, be carried into effect before long.

Table A.—RETURN of British Shipping at the Port of Stettin in the Year 1889.
Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.						Cleared.					
Total Number of Vessels.			Total Tonnage.			Total Number of Vessels.			Total Tonnage.		
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.
437	...	437	314,690	...	314,690	160	14	174	81,378	11,483	92,861
			Total Number of Crews.						Total Number of Crews.		
			6,185						2,092		
			Total Value of Cargoes. £						Total Value of Cargoes. £		
			...						...		

GERMANY.

RETURN of British Shipping at the Port of Stettin in the Year 1889.—continued.

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.										Cleared.							
Countries whence Arrived.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.	Countries to which Departed.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.
	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.				With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		
Australia...	1	...	536	...	...	536	11	...	Belgium	3	...	3	256	...	256	15	...
British East Indies	2	...	4,229	...	...	4,229	51	...	France	12	...	12	2,280	...	2,280	83	...
Belgium	1	...	864	...	...	864	15	...	Germany	1	63	64	151	...	42,428	99	...
Denmark	3	...	1,876	...	1,876	1,876	44	...	Holland	3	...	3	1,939	...	1,939	11	...
France	3	...	2,427	...	...	2,427	47	...	Russia	...	122	122	...	...	121,552	2,082	...
Germany	4	...	4,334	...	1,670	4,334	89	...	Spain	1	...	1	...	...	128	6	...
Greece	2	...	2,764	...	...	2,764	13	...	Sweden	...	...	...	...	...	...	...	...
Portugal	7	...	7,017	...	...	7,017	232	...	Sweden and Norway	8	106	114	4,933	...	117,405	1,893	...
Russia	11	...	16,579	...	...	16,579	162	...	United States	...	...	1	...	...	1,132	7	...
Spain	9	...	1,076	...	688	1,764	41	...									
Sweden	2	...	1,764	...	...	1,764	72	...									
United States	4	...	5,151	...	...	5,151	170	...									
Dutch West Indies	9	...	12,087	...	...	12,087	1,087	...									
Total...	53	6	62,405	4,131	...	66,539	1,087	...	Total...	23	329	352	9,637	277,584	287,221	5,114	...
Direct trade	...	...	...	...	...	314,590	6,185	...	One steam ship	Remained in port	1	...	...	...	141	NH being for sale	...
Total in 1889	...	...	...	...	...	381,129	7,222	...	One sailing vessel	...	...	...	...	...	92,561	2,082	...
" in 1888	...	...	...	...	...	354,272	6,677	...	Direct trade	...	...	...	...	...	...	...	...
Increase of ...	...	...	...	...	...	26,857	545	...	Total in 1889	...	...	496	...	...	381,129	7,224	...

Table C.—RETURN of all Shipping Entered and Cleared at the Ports of Swinemünde and Stettin during the Year 1889.

SAILING VESSELS.

ENTERED.

Nationality.	With Cargoes.		In Ballast.		Total.	
	Vessels.	Tonnage.	Vessels.	Tonnage.	Vessels.	Tonnage.
British... ..	104	15,027	...	...	104	15,027
German... ..	605	92,819	97	7,381	702	100,200
Danish... ..	164	10,402	21	618	185	11,020
Norwegian... ..	82	23,586	...	...	82	23,586
Swedish... ..	94	9,170	1	37	95	9,207
Other countries... ..	87	6,529	2	139	89	6,668
Total in 1889... ..	1,086	167,533	121	8,175	1,207	165,708
„ 1888... ..	1,088	149,974	186	7,553	1,174	157,507

CLEARED.

Nationality.	With Cargoes.		In Ballast.		Total.	
	Vessels.	Tonnage.	Vessels.	Tonnage.	Vessels.	Tonnage.
British... ..	94	11,153	8	2,643	102	13,796
German... ..	613	86,482	77	8,691	690	95,173
Danish... ..	170	9,318	21	2,083	191	11,401
Norwegian... ..	82	11,755	32	11,995	84	23,750
Swedish... ..	78	5,236	11	2,806	89	8,032
Other countries... ..	25	4,123	16	4,172	41	8,295
Total in 1889... ..	1,032	128,057	165	32,390	1,197	160,447
„ 1888... ..	1,054	147,566	175	25,196	1,229	172,762

STEAM SHIPS.

ENTERED.

Nationality.	With Cargoes.		In Ballast.		Total.	
	Vessels.	Tonnage.	Vessels.	Tonnage.	Vessels.	Tonnage.
British... ..	595	526,356	6	4,134	601	530,490
German... ..	1,437	503,422	141	21,334	1,578	524,756
Danish... ..	270	153,240	18	11,227	288	164,467
Norwegian... ..	110	28,695	...	...	110	28,695
Swedish... ..	413	101,677	11	2,846	429	104,523
Other countries... ..	68	63,523	6	1,602	64	65,130
Total in 1889... ..	2,888	1,376,918	182	41,143	3,070	1,418,061
„ 1888... ..	2,481	1,180,542	160	35,714	2,641	1,216,256

CLEARED.

Nationality.	With Cargoes.		In Ballast.		Total.	
	Vessels.	Tonnage.	Vessels.	Tonnage.	Vessels.	Tonnage.
British... ..	94	79,362	506	449,722	600	529,584
German... ..	1,124	242,819	451	155,063	1,575	535,387
Danish... ..	228	145,137	56	17,418	284	162,605
Norwegian... ..	42	11,044	63	17,401	110	28,445
Swedish... ..	175	45,780	253	58,612	428	104,392
Other countries... ..	65	22,876	15	9,655	70	32,531
Total in 1889... ..	1,718	647,063	1,349	745,876	2,067	1,392,944
„ 1888... ..	1,564	605,224	1,075	611,808	2,639	1,217,032

STETTIN.

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Table D.—RETURN of all Shipping at the Port of Stettin in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	103	13,937	393	367,192	496	381,129
German	664	96,984	1,527	608,521	2,191	605,505
Danish	175	10,104	231	180,016	406	140,120
Norwegian	81	23,518	103	27,058	184	50,576
Swedish	93	9,127	346	87,283	439	96,410
Other countries	38	6,546	60	62,623	98	69,169
Total	1,154	160,216	2,660	1,182,693	3,814	1,342,909
„ for the year preceding ...	1,117	154,556	2,247	993,724	3,364	1,148,280

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	102	13,796	392	366,298	494	380,082
German	652	91,957	1,524	619,152	2,176	611,109
Danish	181	10,485	227	128,154	408	138,639
Norwegian	83	23,682	103	26,808	186	50,490
Swedish	87	7,952	345	87,152	432	95,104
Other countries	39	7,055	64	28,461	103	35,516
Total	1,144	154,927	2,655	1,156,013	3,799	1,310,940
„ for the year preceding ...	1,172	169,811	2,245	994,500	3,417	1,164,311

RETURN of all Shipping at the Port of Swinemünde in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	1,090	208	163,298	209	164,388
German	38	3,216	81	16,235	89	19,451
Danish	10	916	57	34,451	67	35,367
Norwegian	1	68	7	1,637	8	1,705
Swedish	2	80	83	17,240	85	17,320
Other countries	1	122	4	2,507	5	2,629
Total	53	5,492	410	235,368	463	240,860
„ for the year preceding ...	57	2,951	394	222,532	451	225,483

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels	Tons.
British	103	14,886	600	529,584	703	544,470
German	690	95,173	1,575	535,387	2,265	630,560
Danish	191	11,401	284	162,605	475	174,006
Norwegian	84	23,750	110	28,445	194	52,195
Swedish	89	8,032	428	104,392	517	112,424
Other countries ...	41	8,295	70	32,531	111	40,826
Total	1,198	161,537	3,067	1,392,944	4,265	1,554,481
" for the year preceding ...	1,229	172,762	2,639	1,217,032	3,868	1,389,794

Table E.—RETURN of all Shipping at the Port of Swinemünde during the Year 1889.

Nationality.	Sailing.			Steam.			With Grain and General Cargoes.			In Ballast.		
	Sailing.			Sailing.			Sailing.			Sailing.		
	Number of Vessels.	Tonnage.	Number of Vessels.	Number of Vessels.	Tonnage.	Number of Vessels.	Number of Vessels.	Tonnage.	Number of Vessels.	Number of Vessels.	Tonnage.	Number of Vessels.
Austrian ..	...	...	...	...	...	...	...	...	...	...	...	...
Belgian ..	1	1,090	208	...	163,298	...	...	163,298	...	...	...	...
British ..	10	916	57	...	34,451	...	...	5,562	...	...	...	...
Danish ..	...	...	...	3	804	...	...	...	...	...	...	...
Dutch ..	1	122	...	1	122	...	...	...	...	...	...	...
French ..	...	...	2	...	1,688	...	...	...	...	...	...	...
Norwegian ..	1	68	7	...	1,637	...	...	583	...	...	...	...
Russian ..	...	...	2	...	819	...	...	807	...	...	...	...
Swedish ..	2	80	53	...	17,240	...	...	...	...	...	...	...
United States of America ..	...	...	...	...	...	...	...	...	...	...	...	...
Total, foreign...	16	2,276	359	4	926	217	11	1,350	135	...	...	7
German ..	38	3,216	51	7	1,426	6	7	316	17	24	1,474	29
Grand total ..	53	6,492	410	11	2,352	222	18	1,666	152	24	1,474	36
					235,368			176,247				4,623

Table F.—RETURN of Principal Articles of Import to Stettin during the Years 1889–88.

Articles.	Quantity.			
	1889.		1888.	
	Tons.	cwts.	Tons.	cwts.
Scraps of all kinds	23,293	10	23,869	16
Cotton, raw and manufactured ..	3,623	0	3,079	6
Drugs, chemicals, &c.	37,569	8	23,109	12
Metals—				
Lead, raw and worked	539	14	1,312	0
Iron	161,522	16	113,208	2
Copper	1,338	8	510	4
Zinc, tin, &c., raw and worked ..	1,061	4	567	2
Coals, coke, &c.	189,821	8	203,400	8
Cements, clays, ores, &c.	252,363	8	166,302	2
Grain—				
Wheat	928	4	2,378	6
Barley	21,443	16	6,920	6
Rye	68,723	16	171,037	16
Oats	84,911	0	34,953	14
Maize	20,294	10	1,142	18
Pulse	6,043	16	1,591	16
Other kinds	1,773	2	1,418	2
Seeds	49,336	6	25,849	2
Wool, raw and manufactured ..	2,027	18	1,022	0
Paper	2,608	0	1,480	18
Sugar, raw and refined	704	14	716	0
Beer and wine	4,448	16	4,872	0
Spirits	2,699	18	2,074	4
Groceries	27,133	14	32,114	4
Coffee	6,190	5	7,256	2
Petroleum	48,931	12	54,321	2
Oils and grease	41,565	16	34,051	6
Hides and leather	1,202	14	2,042	2
Timber, worked	15,337	2	9,989	14
" unworked	111,369	2	91,717	4
Stones and bricks	80,064	2	60,479	6
Herrings	85,399	0	66,618	18
All other merchandise	39,773	9	37,505	10
Total	1,384,043	8	1,176,911	2

Table G.—RETURN of Principal Articles of Export from Stettin during the Years 1889–88.

Articles.	Quantity.	
	1889.	1888.
	Tons. cwt.	Tons. cwt.
General merchandise	240,597 16	266,822 4
Metals, raw	40,782 12	39,760 2
„ worked	12,669 14	10,643 12
Coals and coke	17,145 6	11,274 18
Cements	44,321 16	47,989 4
Grain—		
Wheat	8,297 14	13,074 10
Barley	12,994 18	18,659 6
Rye	278 18	689 2
Oats	8 6	664 10
Maize	628 8	36 16
Pulse	2,888 12	3,285 6
Other kinds	395 8	612 0
Seeds	16,744 16	14,208 8
Sugar, raw	36,889 18	46,457 2
„ refined	33,264 12	38,901 14
Spirits	13,806 10	8,348 0
Timber, worked	57,473 14	60,846 16
„ unworked	20,554 0	13,488 14
Herrings	8,535 0	10,727 4
Total	568,267 18	606,484 8

Table H.—SPECIFICATION of the Different Articles and Quantities Imported from and Exported to Great Britain in 1889-88.

Description of Articles.	Imported.		Exported.	
	1889.	1888.	1889.	1888.
	Tons. cwts.	Tons. cwts.	Tons. cwts.	Tons. cwts.
Scraps of all kinds ..	643 8	58 2	676 16	578 6
Cotton, raw and manu- factured ..	3,172 10	2,406 2	0 8	0 6
Drugs, chemicals, &c. ..	12,424 16	9,429 12	1,549 0	2,678 14
Metal—				
Lead, raw and worked..	35 8	10 18	4,109 10	2,524 0
Iron, raw ..	118,975 14	86,803 6	165 6	42 6
" worked ..	9,424 18	6,693 8	16 18	47 0
Copper, raw and worked	849 2	96 16	21 4	217 6
Zinc, tin, &c. ..	512 6	278 16	24,797 14	20,956 0
Coal and coke ..	189,517 10	203,009 18	1,822 0	590 0
Cements, clays, ores ..	69,370 18	54,157 6	185 12	261 6
Grain—				
Wheat ..	0 8	0 10	122 16	246 0
Barley ..	26 8	.. ..	4,094 0	8,489 0
Rye ..	.. ..	.. ..	.. ..	.. ..
Oats ..	3 18	.. ..	.. ..	3 2
Maize ..	0 16	.. ..	.. ..	.. ..
Pulse ..	.. ..	0 4	33 2	87 6
Other kinds ..	2 10	.. ..	7 14	2 10
Seeds ..	12,031 14	5,747 0	1,969 18	2,505 18
Wool, raw and manu- factured ..	1,274 16	688 2	67 18	59 14
Paper ..	11 2	11 4	4,618 6	4,127 8
Sugar, raw ..	.. ..	0 2	19,380 12	23,434 0
" refined ..	1 18	2 16	13,122 18	11,613 1
Beer and wine ..	373 16	937 10	1 4	1 12
Spirits ..	100 12	55 8	495 2	529 16
Groceries ..	1,001 12	1,271 6	1,364 0	495 2
Petroleum ..	.. ..	0 8	.. ..	.. ..
Oils and grease ..	9,563 8	6,602 2	2,886 2	3,196 9
Hides and leather ..	482 12	439 6	31 4	4 4
Timber, worked ..	571 8	43 0	43,374 14	44,377 12
" unworked ..	488 10	233 10	13,364 12	9,715 8
Slates, stones, and bricks	9,698 14	9,115 10	38 2	455 10
Coffee ..	1,306 8	1,666 6	.. ..	.. ..
Farina ..	.. ..	.. ..	4,285 16	5,649 2
Flour ..	0 12	0 8	509 18	1,653 0
Molasses ..	296 4	286 12	2,563 16	6,739 8
Herrings ..	51,742 16	42,944 12	.. ..	0 4
All other merchandise ..	7,469 12	5,628 10	2,560 12	769 10
Total ..	496,376 4	438,603 10	147,736 14	157,045 10

Table I.—TABLE of Importation and Exportation in the Port
Swinemünde only during the Years 1889–88.

Description of Articles.	Imported.		Exported.	
	1889.	1888.	1889.	1888.
	Tons. cwts.	Tons. cwts.	Tons. cwts.	Tons. cwts.
Scraps of all kinds ..	220 9	173 14	1,864 10	1,117 18
Cotton and wool ..	782 0	241 0	779 13	58 10
Drugs, chemicals, &c. ..	2,310 7	2,689 4	361 5	663 18
Metals—				
Lead, raw and worked	0 16	6 8	1 5	1 2
Iron ..	242 1	416 6	12 1	467 6
Copper, zinc, and tin ..	11 18	19 0	261 0	1,687 6
Coal, coke, &c. ..	306,317 17	277,165 2	611 0	1,028 12
Cements, clays, ores, &c..	14,109 10	18,818 0	9,997 11	9,462 6
Grain—				
Wheat ..	486 0	216 18	.. ..	.. ..
Rye ..	3,007 6	1,280 16	.. ..	.. ..
Barley ..	195 0	26 0	290 5	583 2
Oats ..	26 2	165 4	.. ..	.. ..
Seeds, potatoes, &c. ..	102,181 0	988 0	501 5	1,743 6
Paper ..	70 1	148 4	1,415 16	954 10
Sugar ..	.. ..	10 8	1,517 14	1,248 12
Beer, wine, and spirits ..	64 4	70 12	5 17	5,110 0
Petroleum, oils, and grease	1,128 19	2,746 4	0 5	556 2
Hides and leather ..	51 12	88 4	57 16	60 14
Timber, worked ..	119 5	158 0	40 16	53 6
" unworked ..	7,860 13	7,658 8	103 19	430 4
Stones and bricks ..	26,731 4	30,018 0	15,055 18	12,233 16
Groceries and molasses ..	679 5	1,011 6	1,010 4	2,380 6
All other merchandise ..	6,907 16	6,483 2	90 5	432 10
Total ..	473,503 0	345,598 0	33,973 0	40,272 6
Herrings, in barrels ..	94,635	.. ..	.. ..	.. ..
Cattle, head ..	4	.. ..	.. ..	.. ..

Table J.—TABLE showing the Total Tonnage of all Articles Imported to Stettin from Foreign Countries during the Years 1889-88.

Countries.	1889.	1888.
	Quantity.	Quantity.
	Tons.	Tons.
Africa	..	..
Australia	2,492	1,788
Brazil	..	..
British East India	4,129	4,118
British North America	2,607	..
Belgium	32,045	22,116
China	..	..
Denmark	25,429	18,766
France	21,964	21,400
Great Britain	496,376	438,603
Greece.. .. .	..	..
Holland	28,813	33,868
Italy	2,057	3,790
Norway	60,245	33,067
Portugal	8,804	8,125
Russia	190,185	212,191
Roumania	1,601	..
Spain	25,028	11,155
Sweden	167,126	92,607
Turkey	3,644	122
United States of America	88,157	68,561
Uruguay	264	..
West Indies	..	4,490
Zollverein ports	220,664	188,451
Other German ports	2,518	13,683
Total	1,884,048	1,176,911

Table K.—TABLE showing the Total Tonnage of all Articles
Exported from Stettin to Foreign Countries during the Years
1889–88.

Countries.	1889.	1888.
	Quantity.	Quantity.
	Tons.	Tons.
Africa	..	..
Australia	..	..
Brazil	658	941
British East Indies	..	..
Belgium	8,204	13,499
China	..	..
Denmark	44,585	43,417
France	17,048	32,941
Great Britain	147,737	157,040
Greece	..	..
Holland	41,512	67,627
Italy	1,873	1,960
Norway	21,328	20,982
Portugal	826	765
Russia	40,548	45,788
Roumania	..	..
Spain	9,767	3,945
Sweden	73,043	51,141
Turkey	2	1
United States of America	26,867	37,982
West Indies	18	..
Zollverein ports	134,256	123,422
Other German ports	..	78
Total	568,267	606,484

Table L.—NATIONALITY of Sea-going Vessels which Entered the Port of Stettin during the Year 1889.

Nationality.	Sailing Ships.	Steam Ships.	Total of Ships.
British	103	393	496
Danish	175	231	406
Dutch.. .. .	10	46	56
French	7	1	8
German (including coasting)	941	1,527	2,468
Greek.. .. .	..	1	1
Norwegian	81	103	184
Russian	22	14	36
Spanish	..	1	1
Swedish	93	346	439
United States of America	1	..	1
Total	1,433	2,663	4,096

Table M.—SUMMARY Table of Importation and Exportation in the Port of Swinemünde only during the Year 1889.

Description of Articles.		Imported.	Exported.
		Tons. cwt.	Tons. cwt.
Coal and coke	..	306,817 16	610 10
Grain (wheat, rye, barley, oats)	..	3,714 4	290 2
General cargo	..	163,471 0	33,077 8
Total	..	473,503 0	33,978 0
Herrings	Barrels ..	94,635	..
Cattle	Head ..	4	..

Table N.—VESSELS Built in Stettin during the Year 1889 (Delivered).

Number.	Name of Vessel.	Gross Register Tonnage.	Tonnage Displacement.	Indicated Horse Power.	Description of Vessel.	Owners.	Where Belonging to.	Where Built.
183	Augusta Victoria	7,561	10,000	12,500	Twin screw fast steamer	Hamburg-American Packet-Actien Company	...	Vulcan Works
184	Kaiser Wilhelm II.	9,550	10,000	7,000	Screw fast steamer	North German Lloyd	Hamburg	"
186	London	4,378	2,800	3,600	Screw steamer	Neue Dampfer Company	Bremen	"
189	Scandia	4,378	2,800	3,600	"	Hamburg-American Packet-Actien Company	Stettin	"
190	Dania	4,378	2,800	3,600	"	"	Hamburg	"
191	Gelondrina	853	7,800	3,300	"	"	"	"
192	Gluckauf	396	280	700	Twin screw steamer	E. Torndiat	Buenos Ayres	"
193	Moltzen	396	280	700	Screw steamer	J. F. Braunlich	Stettin	"
	Kaiserin Augusta Victoria	396	280	700	"	Spree Havel Steamship Actien Co. " Stern "	Berlin	Möller and Hoberg
	Kaiserin Augusta	396	280	700	Twin screw steamer	"	"	"
	Kaiserin Victoria	396	280	700	"	"	"	"
	Kronprinz Friedrich	396	280	700	"	"	"	"
	Kronprinz Friedrich Wilhelm	396	280	700	"	"	"	"
111	Prinz Adalbert	23	160	160	"	"	"	"
112	Prinz August	23	160	160	"	"	"	"
113	Prinz Oscar	23	160	160	"	"	"	"
114	Prinz August	23	160	160	"	"	"	"
115	Jungius	23	160	160	"	"	"	"
116	Hagedorn	23	160	160	"	"	"	"
117	Hopstock	23	160	160	"	"	"	"
118	Clasius	23	160	160	"	"	"	"
119	Leasing	23	160	160	"	"	"	"
120	Perthes	23	160	160	"	"	"	"
121	Tettenborn	23	160	160	"	"	"	"
122	Hans	23	160	160	"	"	"	"
123	Bagenhagen	23	160	160	"	"	"	"
124	Busch	23	160	160	"	"	"	"
125	Reppold	23	160	160	"	"	"	"
126	Kaller	23	160	160	"	"	"	"
127	Waldemar	23	160	160	"	"	"	"
128	Dahlmann	23	160	160	"	"	"	"
129	Jenisch	23	160	160	"	"	"	"
130	Elfe	23	160	160	"	"	"	"
	Wilde et Petermann	23	160	160	"	"	"	"
	Hamburg Harbour Steamship Actien Co.	23	160	160	"	"	"	"
	Hamburg Harbour Steamship Actien Co.	23	160	160	"	"	"	"

GERMANY.

Table N.—VESSELS Built in Stettin during the Year 1889 (Delivered)—continued.

Number.	Name of Vessel.	Gross Register Tonnage.	Tonnage Displacement.	Indicated Horse Power.	Description of Vessel.	Owners.	Where Belonging to.	Where Built.
131	Friedensburg	150	...	...	Tug lighter	Stettin Portland Cement Fabric	Stettin	Möller and Holberg
132	Cressen	152	...	250	Paddle steamer	Pomerania Gebr. Dittmann	Stettin	...
...	Die Oder	157	...	250	...	Thiem and Genossen	Greifenhagen	...
...	Kaiser Friedrich Barbarossa	114	...	250	...	Associated Masters	Breslau	...
...	Kaiser Friedrich III.	147	...	220	...	...	Stettin	...
...	Annie	75	...	60	After-paddle steamer	C. H. W. Schmidt	Stettin	...
...	Robert	44	...	140	Screw steamer	Kuba and Spangenberg	Hamburg	...
...	Debrück	39	...	140	...	Stettin Portland Cement Fabric	Stettin	...
...	Demmin Packet III.	124	...	100	...	L. Zimmermann	Demmin	...
...	Wilhelm	42	...	140	...	H. Kiempien	Hohensaaten	...
...	Waldemar	32	...	140	...	W. Schütze	Altenplathow	...
...	Otto	44	...	140	...	O. Weiskopf	Spandau	...
...	Carl	10	...	50	Tug lighter	Merzario	Stettin	...
...	Waldolina	175	...	...	...	Stettin Portland Cement Fabric	Stettin	...
...	Kalkofen	175	...	...	...	...	Stettin	...
...	Viezig	175	...	...	...	...	Stettin	...
...	Liebeseele	5	...	...	Screw steamer	B. Schneider	Berlin	...
...	Schwalbe	...	...	40	Dredge	...	Berlin	...
...	...	...	...	12	...	Rutschmann	Fürstenwalde	...
...	...	...	...	...	Paddle steamer	Rehngatter	Homburg am Rhine	...
112	Waldemar III.	601	...	1,000	...	...	Homburg am Rhine	Aron and Gohnow

Table O.—SHIPS in the Course of Construction at the Beginning of the Year 1890.

Number.	Name of Vessel.	Gross Register Tonnage.	Tonnage Displacement.	Indicated Horse-power.	Description of Vessel.	Owners.	ere belonging to.	Where built.
194	Spree	7,000	9,100	11,500	Screw fast steamer	North German Lloyd	Bremen	Vulcan Works
195	Havel	7,000	9,100	11,500	Screw fast steamer	"	"	"
196	Berlin	425	630	850	Screw steamer ice-breaker	Corporation of Merchants	Stettin	"
197	Fürst Bismark	9,000	11,600	14,000	Twin screw steamer	Hamburg-American Packet-Actier Co.	Hamburg	"
198	?	...	10,000	8,000	Armoured corvet twin screw	Imperial Government	Germany	"
199	?	...	10,000	8,000	Armoured corvet twin screw	"	"	"
200	Sirius	500	...	250	Screw steamer	R. Kleyenstüber	Königsberg in Prussia	"
201	Wega	40	...	100	Twin screw steamer	Imperial Government	Germany	Möller and Holberg
202	Vastor	40	...	100	"	"	"	"
203	Freiland	40	...	100	"	"	"	"
204	Langenberg	330	...	250	Screw steamer	Germania Coasting Steamship Company	Hamburg	"
205	?	70	...	180	Sea dredge	G. Peters	Colberg	"
206	?	...	...	50	Lighters	Royal Government	"	"
207	Ida	14	...	45	Screw steamer	"	Danzig	"
208	Triton	600	...	350	Steam lighters with twin screws	Silesian Steamship Company	Breslau	"
209	Moltke	200	...	100	"	Steamship Company "Neptun"	Bremen	"
210	Roon	200	...	100	"	Berlin Fast Steamer Company	Berlin	"
211	Blumenthal	200	...	100	"	"	"	"
212	Guben	200	...	100	"	"	"	"
213	?	200	...	100	"	"	"	"
214	?	230	...	250	After-paddle steamer	Silesian Steamship Company	Breslau	"
215	?	230	...	250	"	Casari Wolheim	Berlin	"
216	?	42	...	100	Screw steamer	Bierhals	"	"
217	Holland	330	...	250	Dredge	German Coasting Steamship Company	Altenplahow	"
218	?	...	...	40	"	R. Schneider	Hamburg	"
219	Monteur	10	...	20	Screw steamer	Möller and Holberg	Berlin	"
220	?	...	...	...	"	"	Grabow on the Oder	"

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1889.

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Nº. 610.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

GERMANY.

REPORT FOR THE FIRST HALF OF THE YEAR 1889

ON THE

TRADE OF GERMANY.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 573.

*Issued during the Recess and Presented to both Houses of Parliament
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GERMANY.

FRANKFORT.

Consul-General Oppenheimer to the Marquis of Salisbury.

My Lord, *Frankfort-on-Maine, August 30, 1889.*

I HAVE the honour to hand your Lordship a Report on the Exports of Germany for the first six months of this year, compared with those of Great Britain and France during the same period.

These statistics, and the remarks made, appeared in one of this city's leading papers, and I think they will be read with interest.

I have, &c.

(Signed) CHARLES OPPENHEIMER.

An Additional Report on the Trade and Commerce of Germany in the First Six Months of 1889.

The following table shows the exports from Germany, during the first half-year of 1889, of the most important industrial productions, compared with the exports for the same period in 1888, 1887, and 1886:—

Exports from
Germany in
the first half-
year of 1889.

Table L.—GERMAN Exports,* in Double Cwts., during the First Half-year.

	1889.	1888.	1887.	1886.
Cotton goods	127,852	149,126	150,569	131,392
Dresses and linen	29,336	32,605	30,817	27,218
Cordage and ropes	19,991	22,095	21,610	18,342
Linen goods	13,485	17,747	14,948	13,770
Silk goods	1,226	1,378	1,155	1,100
Half-silks and trimmings ..	26,851	30,946	29,146	23,945
Woollen goods of every description	112,514	129,483	125,023	120,222
Pig-iron.. ..	885,850	634,186	1,197,295	1,197,259
Rails	505,251	565,301	796,351	758,027
Wrought-iron	905,734	715,635	999,876	750,303
Sheet-iron	348,303	318,601	246,966	203,887
Iron wire	860,284	958,314	1,305,241	1,213,391
Other articles of iron ..	1,531,692	1,618,844	1,496,221	1,318,977
Locomotives and engines ..	29,218	47,884	25,944	37,214
Sewing machines	35,241	30,182	32,084	33,040
Other machines	318,206	320,130	290,480	262,028
Copper wares	42,131	47,788	50,739	47,739
Lead	167,770	165,168	171,346	205,037
Zinc	242,604	231,363	326,619	267,331
Zinc in sheets	62,437	61,582	88,290	67,319
Alizarine dyes	35,523	27,365	24,335	19,438
Aniline dyes	34,874	32,425	32,423	27,919
Chloride of potash	358,862	397,152	358,246	264,492
Ordinary glassware	230,439	317,452	233,574	270,321
Other glassware	125,063	139,164	133,174	117,072
Leather	34,853	34,797	37,397	33,548
Leather goods	24,000	29,009	29,178	26,127
Beer	435,065	639,516	640,790	712,394
Alcohol and spirit	44,781	246,331	184,322	366,104
Butter and margarine.. ..	43,845	86,299	81,576	73,785
Sugar	2,865,433	1,917,568	3,310,121	2,293,420
Paper and paper hangings ..	299,808	299,918	309,530	275,895

* Published in weight only, not ad valorem.

Textiles.

In the textile industry the result is not favourable. While, until 1888, the figures mostly showed an increase, a material decline set in, in 1889, in the exports of cotton goods, dresses and linen, linen goods, half-silks, and woollen goods. As the textile industry ranks first in importance, this decline deserves due attention.

Iron.

In the iron industry the results are likewise not satisfactory. Exports of pig-iron have declined from 1886 to 1888, by 562,073 double cwts.—nearly one-half,—of which deficiency a small part only was recovered this year (261,664 double cwts.).

Rails.

Wrought and sheet-iron.

In rails the export has yearly decreased, in 1889 it fell short by one-third against 1886. Wrought-iron and sheet-iron present a more favourable aspect. The former has nearly recovered from the loss it suffered in 1888, while the latter gained about 140,000 double cwts. as against 1886.

Wire.

The decrease of exports in the wire industry is rather considerable. Since 1887 a falling-off of 444,957 double cwts. is to be noted. This industry, it appears, is particularly affected by

the tariff policy and the rings formed by the manufacturers. They sell the half-manufactured goods for abroad so much cheaper than at home that it is more remunerative to finish the articles abroad. The other branches of the iron industry offer no compensation for the losses in pig-iron, rails, and wire, as the results are inferior as against 1888, and compared to 1887 have but little improved.

In machinery the export in locomotives and engines falls considerably short of 1888 and 1886, while the exports of other machinery are behind 1888, and but slightly in excess of 1886 and 1887. Machinery.

Sewing machines show a slight improvement on the preceding year. Sewing machines.

Copper-wares have constantly receded; in lead and zinc, exports have likewise materially diminished. Copper, lead, and zinc.

Chemicals continue favourable, especially tar colours and chloride of potash. Aniline dyes improve but slowly. Chemicals.

In sundry articles which up to last year showed a steady advance, a marked decrease is to be noted in 1889, e.g. in ordinary glassware, in leather, and leather goods.

The important decline in the export of alcohol and spirit, as also the increase in the export of sugar is caused by particular circumstances. It seems surprising that the export in beer shows a decline in face of the fact that so many breweries have increased their production. Alcohol. Sugar. Beer.

Paper has likewise receded as against 1887. Paper.

The following Table II., shows the exports from France of some important articles during the same periods:— Exports from France of some important articles.

Table II.—FRENCH Exports in France during the First Half-year.

	1889.	1888.	1887.	1886.
Silks and half-silks ...	182,123,000	112,019,000	108,164,000	126,841,000
Woollen goods... ..	161,779,000	166,848,000	169,091,000	171,861,000
Cotton goods	51,179,000	51,585,000	57,447,000	62,247,000
Woollen yarns	26,986,000	15,830,000	16,573,000	16,385,000
Leather	50,654,000	43,499,000	46,211,000	48,097,000
Leather goods	71,837,000	56,340,000	58,404,000	69,749,000
Machines	18,477,000	16,404,000	12,977,000	11,829,000
Instruments of metal... ..	39,334,000	32,515,000	31,764,000	28,085,000
Haberdashery	45,958,000	43,665,000	43,116,000	43,677,000
Dresses and linen	21,558,000	27,727,000	23,434,000	21,229,000
Chemicals	20,111,000	17,631,000	18,182,900	18,466,000
Furniture	16,229,000	13,025,000	12,882,000	12,565,000
Jewellery	28,605,000	28,270,000	26,480,000	21,858,000
Glass wares	12,125,000	11,689,000	12,904,000	11,706,000
Total of French exports ...	1,704,029,000	1,531,340,000	1,544,154,000	1,502,194,000

Compared with the exports from Germany, this table shows a notable increase, particularly as against 1888. In silk goods the increase amounts to 20,104,000 fr.; in woollen yarns, to 11,156,000 fr.; in leather, to 7,215,000 fr.; in leather goods, 15,497,000 fr.; in metal instruments, 6,719,000 fr. A small decrease is to be noted in woollen goods (5,069,000 fr.), and in dresses and linen which receded to the figure of 1886. The total sum in 1889, it will be seen, shows an increase of 172,687,000 as against 1888, and of 201,835,000 as against 1886.

For comparison sake, Table III. shows the British exports of the corresponding periods.

Table III.—BRITISH Exports in Pounds Sterling during the First Half-year.

	1889.	1888.	1887.	1886.
Cotton yarns	5,814,373	5,773,265	5,475,184	5,871,142
Cotton goods	29,268,236	29,768,746	29,021,019	28,332,778
Linon yarns	442,338	421,797	469,481	483,821
Linen goods	2,829,285	2,662,008	2,569,894	2,614,601
Silk goods	1,227,987	1,295,289	1,020,201	1,053,456
Woolen yarns	2,022,940	1,840,512	1,805,051	1,979,909
Woollen goods	10,123,645	9,571,746	9,243,845	9,284,972
Other textiles	54,120,246	53,122,229	51,515,296	51,556,882
Pig-iron	1,155,581	1,066,844	1,352,534	1,064,435
Wrought-iron	884,146	823,951	679,054	670,611
Rails	2,468,791	2,413,325	2,019,978	1,869,756
Wire	1,977,122	2,025,921	1,518,618	1,522,460
Sheet-iron	8,106,826	2,768,596	2,875,420	2,620,677
Iron wares	4,292,512	4,028,944	3,749,736	2,887,108
Sundry iron and steel wares ...	13,884,478	13,125,483	11,977,253	10,918,608
Machines	7,092,924	6,096,590	5,184,802	4,762,523
British exports : total ...	118,987,948	112,717,945	104,295,890	103,861,662

To the foregoing compilations the "Frankfurter Zeitung" adds the following remarks in conclusion:—"In comparing these statistics and the meagre results with the compilations which other papers have lately published with reference to German exports, one cannot be but greatly astonished at finding how little knowledge of the subject exists amongst a great part of the press. Happily, it is true that our transmaritime commerce of late years has much increased in many districts, and this we owe to the energetic activity of our shippers, the capacity of our manufacturers, the unified power of the empire, and to the improved consular service and maritime conditions.

"Our export to European countries, however, has much declined in consequence of the protective tariff policy.

"The total result is a certain stagnation in the export of industrial products, viz. :—

						Marks.
1880	..	..	..	..	..	1,933,000,000
1883	..	..	..	..	..	2,337,000,000
1888	..	..	..	..	..	2,869,000,000

and a notable decrease even during the last half-year.

"In raw materials a steady decrease is seen:—

						Marks.
1880	..	..	..	..	..	958,000,000
1883	..	..	..	..	..	932,000,000
1888	..	..	..	..	..	834,000,000

"The industrial countries which principally compete with us were greatly astonished at our progress in the first half of this decade, but have made great exertions since then, as will be seen by the foregoing statistics; in many important branches they have come up with, and even overtaken us.

"It is to free trade, and to the faithful adherence to the same, that Great Britain owes her great recovery, which enables her to enter all raw material and half-manufactured goods without any additional costs of duty.

"France, suffering as she does through the protective tariff system, has made great exertions, particularly in favour of her industries in articles of luxury, and strengthened thereby her insecure commercial position of the last decade.

"The decrease in our export industries coincides with an increase of our productions in almost every branch, and with a considerable development of the home market. That the export did not proportionately rise as the home trade, is not to be considered as a sign of perfect health of our commercial condition. For the sale in the home market can suddenly recede through a commercial or political crisis. If a corresponding increase in exports does not exist at the same time the highly-developed industry can easily meet with difficulties. To this point we gladly direct the attention of all parties interested. Only a gradual return to the commercial system which was the powerful basis of our industry till 1879 can remove the disadvantage of our present commercial situation."

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680. Kiungchow	1d.	742. Mozambique	1d.
681. Swatow	1d.	743. Caldera and Lota	1½d.
682. Siettin	6d.	744. Nice	1½d.
683. Bordeaux	2½d.	745. Aleppo	1d.
684. Port Said	1d.	746. Hakodate	1d.
685. Coquimbo	½d.	747. New York	2d.
686. Warsaw	1d.	748. Cagliari	1d.
687. Ichang	1d.	749. San Salvador	1d.
688. Wenchow	1d.	750. Gothenburg	2d.
689. Trebizond	1d.	751. Nagasaki	1d.
690. Damascus	½d.	752. Sofia	3½d.
691. Savannah (Georgia)	1d.	753. Meshed	1d.
692. Barcelona	2½d.	754. Yokohama	2½d.
693. Santos	1d.	755. Shanghai	2d.
694. San José	1d.	756. Lisbon	1½d.
695. Batavia	1d.	757. Teneriffe	½d.
696. Genoa	1½d.	758. Noumea	½d.
697. Calais	2d.	759. Tahiti	½d.
698. Marseilles	1d.	760. Bushire	1½d.

No. 761.

Reference to previous Report, Annual Series No. 610.

GERMANY.

FRANKFORT.

Consul-General Oppenheimer to the Marquis of Salisbury.

My Lord,

Frankfort, July 1, 1890.

I HAVE the honour to hand your Lordship, enclosed, the Annual Report on the Trade and Commerce of my district, as also Vice-Consul Ladenburg's Report on the Commerce of the Grand Duchy of Baden, both for the year 1889.

I have, &c.

(Signed) CHARLES OPPENHEIMER.

Report on the Trade and Commerce of Frankfort-on-Maine for the Year 1889.

The commerce between Great Britain and Germany in export and import of goods has been, according to the statistics of 1889, rather satisfactory. Relations between Great Britain and Germany.

Export from Germany to Great Britain shows increased figures in all articles of importance, as compared with those of the preceding year, and the same may be said of German imports from Great Britain, particularly with reference to raw material. Export from Germany to Great Britain.
Imports from Great Britain.

German ironworks, overwhelmed as they were with orders, not having been, it appears, in a position to satisfy all demands, pig iron and iron wares were ordered from English foundries, and considerable quantities were imported. German iron-works.

German agriculture, protected as it is through the tariff, is from year to year better enabled to employ English manures. English manures.

Lard and tallow were also wanted in increased quantities in spite of margarine and cocoa-nut butter made here; the raised import duty thereon, in face of these facts, can hardly be substantiated. Lard and tallow.

After the collapse of the copper syndicate the imports in copper and lead were eight times as large as they were in 1888. Copper and lead.

Rape and rape-seed, which failed in Hungary, were obtained from India by way of England. Rape and rape-seed.

Herrings. Herrings had an increased sale in consequence of the high prices of meat, and also in a measure owing to the potato crop having turned out well; the same may be said of rice, bran, and of malt germs.

Linseed. In linseed the imports exceeded those of any preceding year; Coal and coke. the same was the case with coal and coke during the critical period.

It is well known that the statistics of goods exported to Great Britain from the German Customs' Union include a great many shipments made to transatlantic countries through British ports, which appear as British exports or imports on the table of statistics of the respective countries.

Effects of the
Merchandise
Marks Act.
1887. A comparison of the tables of export from Germany to Great Britain shows that, in spite of the Merchandise Marks Act and other measures, exports from Germany to great Britain have by no means decreased. It appears that quite a number of articles were shipped in larger quantities to and by way of Great Britain than in former years.

The experience of the past year has demonstrated that the Merchandise Marks Act, 1887, which has been extended to almost all the British colonies by this time, far from damaging German export industry, has, as stated in the annual report of the Frankfurt Chamber of Commerce, from which the present is taken, called the attention of foreign buyers to its capability, which, prior to the coming in force of the Act had not been sufficiently appreciated. It appears that goods bearing the inscription "made in Germany" are frequently demanded, and direct relations of German merchants with foreign purchasers have been increased.

The following table (No. I.) shows the principal articles imported from Great Britain into Germany (Customs' Union) in the years 1887 to 1889.

I.—TABLE of the Principal Articles Imported from Great Britain into Germany (Customs Union) in the Years 1887 to 1889.

Articles.		Quantities.		
		1887.	1888.	1889.
Guano	100 kilos.	33,069	13,866	21,113
Bran, germs of malt, refuse of rice	"	1,053	5,030	100,714
Rags of every description	"	9,568	14,472	24,926
Cotton, raw	"	274,321	236,846	212,352
" yarn	"	177,329	179,016	186,798
" goods, dense, raw, &c.	"	2,081		
" net, lace, raw, and plain	"	2,207		
Cotton goods, dense, dyed, and printed	"	1,559	8,318	9,692
Cotton goods, lace, embroidery, trimmings	"	821		
Lead, pig lead	"	5,439	2,561	16,409
Caustic soda	"	12,090	9,363	8,576
Alum, alumine	"	1,270	526	447
Chloride of lime	"	29,787	40,819	33,910
Dyewood extract	"	2,295	2,766	3,134
Double carbonate of soda	"	3,637	4,884	6,704
Calcined soda	"	9,434	4,004	3,387
Soda, raw, crystals	"	3,297	1,056	281
Ammonia, carbonated sal-ammonia, &c.	"	3,062	5,327	8,858
Sulphate of ammonia	"	245,519	246,004	278,295
Aniline dyes, &c.	"	1,274	1,934	925
Cachou, brown and yellow	"	19,735	16,976	33,758
Quinquina, also ground	"	25,147	22,894	27,658
Chlorate of potash	"	5,030	4,062	5,312
Chromate of potash	"	5,954	8,416	9,473
Dyewoods	"	30,340	24,324	52,133
Glycerine, refined and crude	"	10,034	15,221	18,616
Indigo	"	5,238	6,132	7,489
Bone black	"	14,607	29,499	54,219
Bone dust	"	522	1,177	5,716
Sulphate of soda	"	3,243	824	2,430
Saltpeter (Chile)	"	17,466	46,234	52,341
Sulphur	"	2,369	6,298	4,129
Superphosphate	"	32,184	131,425	218,428
Turpentine, &c.	"	5,622	6,497	6,799
Vitriols	"	926	734	6,373
Iron in lump and waste	"	7,339	5,440	24,418
Pig iron	"	1,349,919	1,976,163	2,762,304
Malleable iron and bars	"	30,715	31,589	46,354
Plates and sheets	"	13,088	13,872	25,834
Tin plates	"	20,056	25,793	27,233
Wire, iron and steel	"	8,910	9,540	11,700
Hardware, coarse and cast	"	13,530	18,798	62,309
Anchors and chains	"	9,487	9,594	17,443
Pipes of malleable iron	"	2,574	4,979	6,660
Hardware, better quality	"	11,545	15,860	35,129
Hardware, best	"	3,135	3,503	4,897
Cement	"	13,010	36,658	28,181
Iron ore	"	66,863	235,489	227,693
Hemp	"	2,811	4,960	4,029
Jute	"	328,994	286,263	240,054
Wheat	"	10,493	1,272	2,766
Rye	"	2,810	2,527	3,192

(950)

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I.—TABLE of the Principal Articles Imported, &c.—continued.

Articles.		Quantities.		
		1887.	1888.	1889.
Pulse	100 kilos.	30,756	2,548	2,029
Barley	"	3,212	2,927	3,781
Poppy	"	30,704	32,818	40,295
Rape and rape-seed	"	14,556	28,893	67,002
Tul seed	"	4,341	12,423	19,448
Pea nuts	"	17,948	9,949	19,129
Linseed	"	11,238	9,884	16,508
Palm, kernel and copra ..	"	226,997	264,496	268,190
Maize	"	242	1,574	3,886
Window and plateglass ..	"	1,244	3,031	7,163
Raw hides, fresh and salted ..	"	4,739	4,361	6,599
" limed and dry ..	"	30,680	38,072	57,593
Horse hides	"	3,905	3,105	22,679
Sheep, kid and goat skins ..	"	2,977	3,080	6,950
Horns, horns' tips	"	8,993	7,765	9,918
Cork and tan	"	4,757	3,072	8,189
Lumber and timber	"	4,762	5,657	3,505
Boxwood and cedar	"	6,869	7,180	15,573
Locomotives and locomobiles, and parts thereof	"	12,752	12,853	13,488
Sewing machines, and parts thereof	"	1,955	4,910	17,485
Machines and fittings	"	154,349	210,496	254,961
Indiarubber and guttapercha, raw and cleaned	"	13,107	17,877	23,382
Copper, in pigs	"	64,773	24,792	207,634
Mercury	"	1,263	1,078	1,139
Copper, smelt, and brassware ..	"	2,330	1,656	2,946
Watches	Pieces ..	1,758	1,468	1,971
Leather of every description, excepting for gloves	100 kilos.	10,364	11,234	14,633
Kid leather for gloves and morocco	"	1,007	1,103	1,064
Sole leather of every descrip- tion	"	2,753	4,889	4,545
Goat and sheep skins, smooth ..	"	19,798	24,096	22,279
Jute, &c.	"	1,005	754	1,658
Linen yarn, natural	"	7,122	6,878	6,929
" dyed and bleached	"	3,530	4,687	4,193
Sewing threads	"	1,772	1,794	2,142
Jute and other textiles, natural ..	"	4,250	1,117	2,308
Linen and ticking, natural	"	975	460	493
" " dyed	"	1,656	1,871	2,083
Beer of every description	"	9,104	13,011	21,013
Arrac, rum, cognac, and brandy ..	"	7,341	1,951	4,164
Wines and must, in casks	"	4,763	6,349	6,945
Meat, fresh and dressed	"	13,851	7,561	9,216
Tropical fruits	"	2,415	3,960	5,863
Currants	"	2,626	2,210	2,723
Raisins	"	3,032	2,802	3,584
Almonds	"	1,462	1,567	2,524
Pepper	"	16,280	15,331	17,668
Herrings	Casks ..	505,960	433,817	527,842
Coffee	100 kilos.	109,895	148,922	111,843
Cocoa	"	5,424	6,849	10,435
Fruit, dried	"	793	1,972	2,372
Rice	"	25,706	29,897	46,585
Salt	"	241,327	259,874	229,381

I.—TABLE of the Principal Articles Imported, &c.—continued.

Articles.		Quantities.		
		1887.	1888.	1889.
Molasses	100 kilos.	12,778	12,395	15,008
Tobacco leaves.. ..	"	480	4,873	..
Tea	"	6,123	6,475	6,293
Sugar	"	15,967	18,852	12,608
Cotton oil	"	37,987	31,828	39,628
Linseed oil	"	170,058	199,799	246,610
Olive oil	"	1,204	1,018	1,174
Palm and cocoanut oil ..	"	67,083	65,762	65,128
Lard and grease	"	5,708	6,773	20,918
Stearic, palmiline acid, and paraffin	"	1,464	500	4,882
Fish, bacon, and train oil ..	"	12,223	10,038	13,191
Tallow	"	25,100	20,187	51,402
Petroleum, crude and refined..	"	3,070	2,612	2,300
Lubricating oil, mineral ..	"	40,370	43,901	54,899
Raw silk	"	603	547	207
Slates	"	331,655	351,445	435,464
Coke	"	312,170	310,163	558,800
Coal	"	15,556,063	19,133,959	34,004,504
Straw and beathats, untrimmed ..	"	109,657	69,276	24,066
" " trimmed ..	"	1,424	1,181	2,187
Bitumen, solid and fluid ..	"	3,809	15,856	19,368
Turpentine, resins, crude and refined ..	"	11,530	21,089	22,726
Tar of every description ..	"	79,713	77,809	76,356
Bricks, not glazed	"	12,531	9,433	26,912
Firebricks	"	100,046	168,600	311,515
Crucibles, muffles	"	3,663	1,252	2,044
Pottery, not porcelain ..	"	2,604	3,281	5,344
Wood	"	301,742	321,403	342,855
Shoddy, shoddy waste.. ..	"	11,899	35,002	59,076
Woollen yarns.. .. .	"	104,476	113,298	136,279
Woollen cloths, plain ..	"	6,678	1,726	1,641
Raw zinc, in lumps	"	7,534	17,579	10,925
Raw tin.. .. .	"	29,858	33,754	47,829

Table No. II. contains the list of the principal articles exported from Germany to Great Britain in the years 1887 to 1889.

II.—TABLE of Principal Articles Exported from Germany to
Great Britain in the Years 1887 to 1889.

Articles.		Quantities.		
		1887.	1888.	1889.
Bran, germs of malt, refuse of rice	100 kilos.	5,989	4,384	5,439
Rags of every description ..	"	87,157	91,895	121,324
Cotton yarn	"	13,342	10,886	33,096
" goods, dense, &c. ..	"	8,323	31,389	28,388
" hostery	"	7,403		
" lace and trimmings	"	4,213		
Lead, pig lead	"	104,785	74,192	80,343
Ultramarine	"	12,352	10,322	20,063
Alum, alumine	"	19,568	18,836	26,891
Soda, calcined	"	4,098	2,676	3,500
" raw, crystals	"	3,793	334	619
Potash	"	16,647	16,257	15,092
Alizarine	"	24,305	29,050	31,637
Aniline and transition product to tar colours ..	"	1,563	1,729	2,653
Aniline dyes and tar colours ..	"	11,385	11,848	13,866
White lead and zinc white ..	"	71,130	79,150	117,974
Chloride of potash	"	254,999	153,215	148,315
Glycerine, refined and crude ..	"	2,338	4,644	7,560
Sulphate of potash	"	36,912	44,979	57,355
Mineral waters, artificial and natural	"	25,956	25,332	33,400
Soda and sulphate of soda ..	"	8,022	4,472	5,548
Saltpetre (Chile)	"	4,311	5,252	11,777
" (Nitre)	"	14,091	16,657	40,044
Gunpowder and rock powder ..	"	816	2,682	4,196
Superphosphate and calcined bones	"	5,551	11,508	9,478
Vitriol of every description ..	"	506	1,257	3,125
Tartaric acid	"	6,933	8,019	8,107
Iron in lumps and scraps ..	"	14,190	3,710	4,934
Pig iron	"	25,021	8,705	15,712
Angle iron	"	26,583	22,474	43,316
Fish bellied rails	"	8,848	5,899	12,442
Rails	"	60,274	26,113	65,113
Tire and cutting iron	"	9,207	7,050	1,463
Malleable iron in bars	"	64,423	66,582	36,756
Iron loops, with bars ingots ..	"	31,751	10,686	4,400
Plates and sheets of malleable iron	"	21,800	52,996	16,779
Iron and steel wire	"	337,931	330,342	335,746
Ironware, cast very coarse ..	"	881	9,815	12,519
Anvils, vices, &c.	"	1,903	1,346	371
Railway axes	"	5,086	3,888	18,205
Pipes of malleable iron	"	8,612	10,060	2,282
Hardware, coarse	"	20,142	24,938	31,936
Wire nails	"	104,954	132,518	126,146
Hardware, fancy	"	4,025	4,965	7,219
Cement	"	4,188	7,403	18,317
Flax	"	11,862	17,166	15,268
Hemp	"	119,402	121,318	162,784
Wheat	"	1,027	295	132
Oats	"	823	242	9
Pulse	"	69,566	16,434	5,742
Barley	"	27,918	55,244	140,708

II.—TABLE of Principal Articles Exported, &c.—continued.

Articles.		Quantities.		
		1887.	1888.	1889.
Linseed	100 kilos.	15,040	22,660	34,338
Potatoes	"	110,473	51,605	47,159
Clover seed	"	18,699	13,767	..
Fruit, fresh	"	11,926	43,419	147,779
Hollow glass (natural) ..	"	61,841	65,905	75,196
" plain white	"	5,966	9,611	25,457
Plateglass, polished	"	4,520	6,660	7,084
" silvered	"	1,736	2,000	1,165
Bristles	"	1,494	1,501	4,256
Calf skins, fresh and salted..	"	60	1,664	7,616
Hides, fresh and salted ..	"	1,165	3,334	7,401
Sheep skins, rawhaired ..	"	816	1,358	11,240
Lumber and timber	"	178,993	192,887	258,140
Wood, worked	"	3,620	2,235	2
Furniture and parts of hard wood	"	1,684	1,658	3,398
Wooden ware (toys excepted)	"	16,911	21,765	66,658
Hops	"	29,773	29,257	..
Pianos and finger-boards ..	"	6,882	9,614	40,047
Other musical instruments ..	"	2,229	3,003	8,122
Sewing machines and parts ..	"	2,347	3,981	7,084
Other machines and parts ..	"	8,276	11,314	24,069
Clothing, linen, and millinery	"	13,672	12,907	17,294
Copper, pigs and lumps	"	50	2,229	1,850
Copper articles	"	3,402	3,520	5,116
Aluminum and nickel ware ..	"	2,610	1,827	2,877
Textile goods in connection with other material ..	"	979	1,307	3,075
Watches (works and cases) ..	Pieces ..	1,730	4,015	6,179
Leather of every description ..	100 kilos.	4,055	4,823	5,500
Kid leather (morocco)	"	4,366	4,033	9,912
Fancy leather goods	"	6,711	8,544	10,734
Cords and ropes	"	3,935	3,980	5,778
Beer of every description	"	13,370	11,290	19,292
Spirits and alcohol	"	10,604	15,124	10,254
Wine and must in casks	"	5,482	7,151	6,244
Sparkling wines in bottles ..	"	8,089	7,321	7,451
Other wines in bottles	"	13,406	9,883	14,755
Butter (also artificial)	"	9,253	12,847	52,543
Meat	"	1,057	11,317	57,040
Cheese	"	106	144	259
Starch, baking powder, arrowroot	"	74,207	91,268	2,550
Salt	"	741	21,346	29,568
Flower and meal	"	180,093	229,434	397,104
Tobacco leaves	"	3,865	4,873	3,869
Sugar	"	3,843,805	2,629,581	2,874,263
Palm and cocoanut oil	"	30,657	34,825	64,155
Rape-seed oil, &c.	"	60,231	54,239	41,142
Celluloid (for papermaking)	"	62,119	66,798	88,527
Grey blotting and packing paper	"	27,380	26,243	54,651
Paste board	"	118,249	104,345	118,749
Writing, printing, and drawing paper	"	26,070	24,733	67,067
Silks, handkerchiefs, ribbons, shawls	"	668	538	589

II.—TABLE of Principal Articles Exported, &c.—continued.

Articles.		Quantities.		
		1887.	1888.	1889.
Floss silk (natural)..	100 kilos.	367	526	430
Silk and floss silk, dyed ..	"	307	284	282
Half-silk materials ..	"	17,867	17,683	16,260
" fringes and buttons, &c. ..	"	2,990	3,132	2,185
Peat ..	"	98	99	308
Coal ..	"	27,050	29,176	91,300
Straw and best hats, un-trimmed ..	Pieces	13,897	16,519	42,316
Straw and best hats, trimmed ..	"	12,133	8,704	9,397
Bitumen ..	100 kilos.	18,482	23,794	18,305
Bricks ..	"	4,676	4,095	8,961
Firebricks ..	"	124	741	606
Other pottery ..	"	2,366	2,799	4,423
China and porcelain ..	"	25,548	23,573	28,082
Cows ..	Head ..	2,166	3,959	..
Oxen ..	"	6,397	8,821	..
Sheep ..	"	282,777	319,601	202,811
Lambs ..	"	24,819	25,035	2,499
Shoddy and woollen waste ..	100 kilos.	20,940	23,730	22,893
Woollen yarn ..	"	2,621	5,524	6,744
Hosiery, woollen ..	"	7,634	9,171	11,941
Woollen cloth, plain ..	"	18,567	13,590	21,113
" plush ..	"	1,681	1,971	2,608
" trimmings ..	"	3,859	3,585	4,259
" goods, printed ..	"	1,827	3,277	1,244
Raw zinc, scrap and lump ..	"	254,734	225,975	297,335
Zinc in sheets ..	"	61,943	51,708	59,620

Coal.

In the coal trade a complete change has taken place. The prosperous state of things in every direction from 1871 to 1875 showed that the yield was insufficient to meet the demand, and in consequence large amounts of capital were employed for the purpose of working new shafts. When a period of discouragement set in, and the output constantly increased, the market became more and more depressed. Under these circumstances coal declined so much in price that in many cases the capital invested yielded no interest. Reduction of wages or discharge of men was out of the question at that time. The dulness in the trade led the larger industrial establishments as well as the railway companies to limit their purchases to their requirements only, which considerably affected the price, and contributed in a great measure to the existing depression. To avert a further decline the owners of collieries formed syndicates for the purpose of putting a stop to the prevailing tendency of underselling and establishing uniformity in prices.

When trade revived the supplies were rather insufficient, there was no over-production, and the consumption was pretty equal to the daily production. Such was the state of things when in May the strike took place, lasting one month and spreading all over Germany. When work was resumed the consumers and dealers

had not only to complete their supplies, but also to make additional purchases in order to be prepared for future emergencies. This extraordinary demand could not fail to produce a steady and considerable advance, and consequently prices on this were twice as high as they were in the latter half of 1888. Although coal and coke had already risen more than 100 per cent. in price, the collieries are by no means well supplied.

The metal trade in 1889.—The past year was most eventful as regards the copper trade. In the beginning the copper syndicate was in full activity, and bought for immediate delivery and on tissue at 78*l.* on the London market. But the gigantic operations of the syndicate soon excited general distrust. At the end of January their agents had to pay from 4*l.* to 5*l.* more per ton than other purchasers. Metal trade
Copper.

In March the syndicate ceased purchasing, when prices rapidly declined from 78*l.* to 35*l.*—the lowest price ever paid for copper—it soon, however, went up again and quoted 42*l.* in August.

In the beginning of the year the price was 97*l.* to 98*l.* Tin. Shortly after it fluctuated between 96*l.* to 93*l.* This article was also influenced by the copper market, and larger arrivals occasioned a further decline, which reached the culminating point in October when 89*l.* was quoted. In November it rose to 98*l.*, and this quotation was maintained until the close of the year.

In January, prices ranged from 34 marks to 35 marks (34*s.* Zinc to 35*s.*), and this article was produced to a limited extent, the proprietors of the works having entered into a coalition with a view to prevent over-production. While the extravagant copper prices prevailed, the alloying of zinc with copper for the purpose of working brass suffered considerably.

After the copper market had assumed a healthier tone the demand for zinc to meet the above requirements increased, and prices steadily advanced to 46 marks (46*s.*). The demand for this metal for other purposes, such as for galvanizing iron and for plates, was very satisfactory throughout the year, showing a considerable increase.

Prices averaged between 24 marks to 25 marks (24*s.* to 25*s.*); Lead. in November they advanced slightly, and at the close of the year the quotations were 27 marks to 28 marks (27*s.* to 28*s.*). The demand was good, the manufactories of lead-colours and the rolling mills were in full activity and supplies regular. But for the increased arrivals from Australia and Mexico prices, owing to the advance in coal and higher wages, would have been much higher.

The transactions were very active, especially in the second half of the year, when pig iron advanced materially. The strikes in the collieries have greatly prejudiced the trade, as on account of the scarcity of coal the works were unable to fulfil their engagements. Iron.

Bar iron and girders were in lively demand. The former rose from 125 marks to 180 marks (6*l.* 5*s.* to 9*l.*) per ton. The price of girders was 113 marks (5*l.* 13*s.*) per ton at the beginning of

the year, at the end they sold at 153 marks (7*l.* 13*s.*) per ton. In sheet iron transactions were likewise rather considerable. Of course the miners' strikes, high wages, and the heavy demand caused a marked advance. Prices for better descriptions rose from 154 marks to 250 marks (7*l.* 14*s.* to 12*l.* 10*s.*) per ton. In white iron the supply was steady. Prices were in keeping with the general tendency, and rose 5 marks to 6 marks (5*s.* to 6*s.*) per case in the course of the year.

Fats.	The prices of fats used for soap were subject to fluctuations, especially palm kernel oil, which was quoted as low as 43 marks (43 <i>s.</i>) in the early part of the year, and rose to 48–49 marks (48 <i>s.</i> –49 <i>s.</i>) per double cwt. Palm oil, for which 56 marks (56 <i>s.</i>) was paid in spring, declined 15 per cent.; in copra and coconut oil prices varied but slightly; in tallow, the interest of the intermediate trade appears to be steadily declining; cotton oil was rather dull on the whole, improving only in December in consequence of the lower English quotations.
Oils.	
Chemicals.	Business was by no means satisfactory in the preceding years, but showed a decided improvement in the latter half of 1889. The chemical industry was but little affected by foreign competition, and according to the report of the Chamber of Commerce some German chemicals have even got the start of English makers, although certain English chemicals still rule the market, and will maintain their position for a long time yet.
Indigo.	Early in 1889 the demand was rather brisk, but in anticipation of an abundant yield in the East Indies the market became dull. Accordingly, sales were very heavy at declining prices.
Aniline dyes.	Although the sales have increased as against the preceding year, prices continued depressed. The rise in all raw materials occasioned by syndicates made this depression more manifest. Hence only such establishments as manufacture the greatest part of their raw materials themselves profited by the increased sales.
Pharmaceutical productions.	The trade in pharmaceutical productions was very satisfactory in the last quarter of the year. The demand having increased the profit was fair.
Fancy soap and perfumery.	The fancy soap and perfumery trade showed improvement in the course of the past year, the export of transatlantic countries having increased, whilst the same cannot be said of the home and European business.
White lead.	In white lead the sales were very satisfactory during the summer, the demand was so great that it could hardly be met, the quotations fluctuated between 26 marks and 27½ marks (26 <i>s.</i> and 27 <i>s.</i> 6 <i>d.</i>), reaching even 30 marks (30 <i>s.</i>) towards the end of the year.
Quinine.	Quinine does not show any steady improvement. Most sales were made by agents who successfully competed with the manufactories. Prices, which ranged between 35 marks and 48 marks (35 <i>s.</i> and 48 <i>s.</i>) were behind last year's quotations, although they were better than in England, when at one time they declined to 30 per cent. During the influenza epidemic this article and

similar preparations, such as antipyrine, phenacetine, antifebrine, &c., were consumed to such an enormous extent, that the manufacturers and dealers were unable to satisfy the demands.

The utilisation of cocoa beans for the manufacture of cocaine has considerably decreased in Europe, as it pays better, it appears, to manufacture the raw cocaine in the countries where the plant is cultivated. Prices remained steady in consequence of additional sources of supply. Cocaine.

On the whole there was a rising tendency in the price of opium. Speculation became very animated, when in autumn intelligence was received that the winter seed in the producing countries was very unfavourable, and in consequence demands increased. Heavy purchases for American account added largely to an advance in prices, owing to the spread of the culture in China, but the export and the value of Indian opium have suffered materially. Egyptian opium is not dealt in, and is solely consumed in the country itself. Opium.

The past year may be regarded as satisfactory to the textile industry in every direction. All the manufactories were in full activity. Textile industry.

The peaceful prospects, the general prosperity and low prices at the beginning of the year caused a lively demand in raw wool. Raw wool.

The sales of La Plata wools are very irregular, the continual fluctuations operating rather unfavourably on the market. La Plata wool.

Hungarian wools fetched prices satisfactory to the growers, the same being from 10 to 15 per cent. higher than last year. In consequence of the brisk demand and the advance in price the producers pay more attention to the handling of the wool. Hungarian wools.

In domestic wools there was an improvement, and the growers enjoyed larger profits than in previous years. It, however, would be a mistake to infer that there is an increased production from this improvement. Heavy imports from abroad, decline in the price, and contagious diseases of the breed, have induced the breeders to diminish their flocks; thus a constant decrease is to be recorded, and the home production has long since ceased to satisfy the wants of the German mills. Domestic wools.

It is a striking fact that while the cloth and carded yarn industry is steadily losing the ground it once held, the manufacture of worsteds is continually receiving an increased impetus. This circumstance may be regarded as a natural result of the rational development of the textile industry, and is not to be attributed, it appears, to the influence of fashion. The mills were in full activity, orders coming in in unusual proportions. Cloth and carded yarn. Worsteds.

Trade in shoddy was normal at the beginning of the year, prices of raw materials being in proportion to those of the manufactured goods. Afterwards the miners' strike, and the high price of coal connected therewith, caused some difficulties. The cost of manufacturing yarns was increased by 1 mark 80 pf. (1s. 9d.) per cwt. Woollen rags advanced to such an extent that many spinners were compelled to limit their production, as the principal Shoddy.

buyers objected to paying higher prices. Under these circumstances profits were reduced to a minimum. The high duty on oleine not having been reduced in the course of last year is the subject of another complaint, as it seriously affects the spinning industry as long as the home demand can only be met by arrivals from abroad.

Cotton. The year 1889 was less favourable to the spinning and weaving industries than the preceding year, as sales were fewer and prices of raw material not being in proportion with those of manufactured goods.

Knitting yarns. Knitting yarns were benefited by the general sound condition of trade. Raw wool having risen, not only in the home markets, but also at the auctions in London, Antwerp, &c., the demand increased to such an extent that most spinners could not keep to the terms of delivery, prices were raised by at least 5 per cent., better descriptions reaching even as high as 10 to 15 per cent. Cotton spool-yarns also improved as against last year.

Raw silk. With respect to raw silk, 1889 was characterised by a brisk trade, sales having been considerably in excess of preceding years. The manufactories were very busy throughout the year.

Dry goods. In dry goods the year opened favourably. The retail business suffered from the mild weather in the early part of winter, as also from the influenza. In Alsatian and English cotton textures, however, transactions were lively and pretty remunerative throughout the year. Croisat satins were in steady demand at rising prices until December, when they remained stationary. In England the demand, and in consequence the advance in price, have been less considerable. English houses received and executed orders for German account.

Silks. In silks transactions were satisfactory, all descriptions having been in good demand.

Velvets. Plushes. Trade in velvets and plushes, owing to low prices, and hence inferior qualities, was rather depressed.

Laces. Net lace. Laces and net lace were greatly benefited by the prevailing fashion, and sales increased considerably as against last year.

Hosiery. Gloves. In hosiery and gloves trade was pretty regular at the beginning of the year, though it cannot be said that the transactions were remunerative, as the smaller manufacturers in Saxony sold at rather low figures.

Carpets. Linoleum. In furniture stuffs, carpets, and linoleum, the business was nearly the same as last year. Although towards the close of the year raw materials advanced, as also the cost of manufacturing, prices did not change, the effects of the above having been neutralised through over-production. Linoleum is now much in favour in Germany, and the sales have much increased as compared with those of last year.

Ropes and cordage. A rather brisk trade is to be recorded in ropes and cordage, owing to the opening of many factories requiring gearing, pulleys, lifts, &c.

Leather goods. The business in leather-goods shows no material alteration compared with previous years. Exports of finer descriptions to Italy and Spain suffered from the dull state of business prevailing

there. With reference to the United States, the protective tariff in force renders it impossible to compete with American manufacturers.

In ivory articles trade was not good, in consequence of the rise in raw material buyers kept back. Ivory articles.

The general condition of the grain market was fairly favourable. Grain.

The wheat crop was abundant, but the quality having been inferior exports were trifling. Wheat.

Much was done in rye during the first quarter, and the decline in price precluded a fair profit. Rye.

Trade in oats was regular throughout the year. Prices remained stationary during the first quarter, while in the second half year a rise was noticeable. Oats.

Although the demand for wine has slightly increased, it cannot be said that business was in a prosperous condition. The Frankfort Chamber of Commerce report says that such dealers as are desirous of supplying their customers with a pure, unadulterated article, find it very difficult to compete with unscrupulous parties realising vast profits from the constantly increasing sales of improved so-called artificial wines. Wine.

During the past year the import and export trade were closely watched in all phases: articles calculated to be employed in home trade and others for transatlantic markets were added to the collection. A catalogue containing descriptions of all articles in hand and supplemented by statements of fresh arrivals is published. The importance which all industrial States attach to export museums is further demonstrated by the successful working of the Vienna Institute. The export museum, which was connected with last year's Paris Exhibition, has rendered such good services in promoting the interest of French trade that it was continued even after the close of the Exhibition. The Frankfort export museum and sample show rooms.

The Frankfort Museum is being more and more appreciated in industrial circles, and it is repeatedly requested to carefully inspect all fresh arrivals, and to communicate with the managers for any information that may be desired: all applications receive immediate and due attention. In 1889 the museum was visited by over 7,000 persons, these figures not including parties who entered into direct relations with the managers without taking admission tickets.

Amongst the numerous and valuable additions received from different quarters last year were the following:—

New Zealand, 46 different descriptions of timber; Australia (Victoria), 44 sorts of timber, with descriptions thereof and statement of weight; Shanghai, 6 pieces long ellsmetz cords, camelots, worsted, and figured lastings, imitation Russian cloth, figured Orleans, three boxes llama braid, one box Genappe cord, and goloshes, with full description of each; Bucharest, samples of red and white wine; St. Domingo, teal seed and oak wood samples, much in demand at present; New Orleans, iron hoops and eyes

for packing cotton, textures made of pine (Wilmington industry); Tiflis, fibres of the Kanaff plant growing on the shores of the Caspian Sea; West Africa, silk cocoons, samples of silk dyed there, and raw silk spun by hand; Johannesburg (Transvaal), samples of the different ores containing gold.

The following, referring to the subsidising of the German Mail Steamer Line to Eastern Africa to the general trade with China and Japan, taken from the same report, will, no doubt, be read with interest:—

Mail
steamers to
Eastern
Africa.

The subsidised mail steamer line to Eastern Africa is closely connected with German colonial matters. The question is not as to the quantity of goods the steamers will have to carry within the next few years, nor as to the direct gain to be realised by such arrangement. Germany merely desires to show that, by establishing regular communication with Eastern Africa, extending to Delagoa Bay, she is determined to maintain and develop her sphere of interest, and to support vigorously all efforts tending towards culture and civilisation. Germany, far from having finished her colonial work, is, on the contrary, firmly resolved to develop her acquisitions regardless of all obstacles. To this end opportunities for transport, independent of foreign control, are an essential requisite. Whether an annual expenditure of 900,000 marks (45,000*l.*) is too high a figure for the accomplishment of this object the future will show. It is an indisputable fact that German traffic with Eastern Africa, by way of British and French ports, is excessively burdened. Goods destined for Germany are not properly handled on board of British packets, often arriving in a very damaged condition, which is not the case with shipments on other lines. All German freighters agree that a regular trade, such as is anticipated in the German colonies, as soon as matters have become fairly settled there, absolutely requires direct German steamer lines. As these steamers will not only be bound for Zanzibar, but also run along the whole Eastern African coast, and whereas the Government of Transvaal is expected to vote certain sums towards the expenses as far as Delagoa Bay, the establishment of this line is fully justified.

German trade
with China.

In the foreign trade of China, confined to the 19 treaty ports, Germany participates with 10·65 per cent. of the imports, and 5·3 per cent. of the exports. The principal staple goods imported into China are, as is generally known, cotton goods and opium. The latter is supplied by India, and the former chiefly by Great Britain. Both articles form 62 per cent. of the total imports. Cotton yarns, imported from India, compete successfully with English yarns. The import of engraving machines for the purpose of cleaning cotton has been attended with such favourable results that arrangements are being made to establish mills for spinning and weaving cotton yarns. It becomes more and more apparent that various and extensive industries, which for their supply in machines and plant will have to depend for a long time yet on foreign markets, are springing up in China; a fact

which ought not to be overlooked by machine manufacturers. Besides cotton and woollen goods of every description, China imports, metals, iron wire, bamboo, steel, tin and zinc plates, aniline dyes, beer, extract of logwood, drops, and lozenges in bottles, window-glass, lamps, leather, machines, brass buttons, condensed milk, sewing needles, oil colours, perfumery, beads, umbrellas, soap, plate-glass, candles, &c.

Germany carries on a lively export trade with China in all these articles, but this traffic will be materially extended yet.

In 1888 Japan was actively engaged to extend her trade. Japan. The total returns show an increase of 26 per cent. as against 87, while the Japanese imports show but a slight increase as compared with those of other countries. This may be owing to the overstocking of the Japanese markets with foreign textiles, sold there in considerable quantities by German manufacturers in 1887. As to metals and articles made thereof, Germany, most likely in consequence of heavy demands at home, did not successfully compete.

The great successes achieved by England and France will, as soon as the home trade has resumed its regular course, necessitate certain sacrifices on the part of the German industry, in order to recover a field which, from the increasing consumption of the Japanese nation, deserves the most assiduous attention.

In 1888 2,467,679 yards of cotton flannel were thrown upon the Japanese market, against 769,856 yards in 1887. These figures show that the demand was greatly over-estimated, and explain the unfavourable results of the transactions. While in pig-iron, iron bars, iron and steel plates, the imports from Germany were trifling, very little competition was encountered in German nails and iron wire. The Germans have also maintained their ascendancy in the following articles, viz.: Aniline dyes, alizarin, extract of logwood, drugs, pharmaceutical preparations, and printing paper. In patent leather, and also in cement, sales increase from year to year.

Reports from commercial travellers in Persia state that Ger- Persia. man textiles were in good demand, as also black and red cloths in medium qualities. Hosiery, silks, and furniture stuffs likewise, it appears, find an excellent market there.

Amongst other articles mentioned as likely to yield a fair profit the following are recommended, viz., glass and crystal ware, petroleum lamps, if arranged for Russian petroleum, lamp-chimneys, and musical boxes.

In Southern Persia German sugar, paper, and matches already compete with French productions. It should be borne in mind that, as all goods are carried by mules, bales should not weigh over 75 kilos. (150 lbs.), and that the most favourable route for direct shipment would be by way of Trebizond, Tabris, or through the Persian Gulf by way of Bagdad.

BADEN.

Mr. Vice-Consul Ladenburg reports as follows:—

We had the satisfaction of being able to report a development of business in general last year, and may, with justice, report an additional increase of prosperity in commerce and industry for 1889.

- Grain.** The general movement in 1889 was similar to that of the preceding year, and, though statistics show an apparent decrease in the imports, this is simply owing to the considerable amount of corn shipped direct for Mannheim account from producing to consuming countries other than Germany.
- Hops.** The 1889 crop, which was picked exceptionally early, and consequently to the advantage of the export trade, proved to be of very fair quality. The whole of the Baden crop quickly changed hands, and, owing to the considerable quantity at rather low prices, Great Britain and the United States were the chief foreign buyers.
- Seeds.** Seeds showed an improvement in comparison to the preceding year.
- Flour.** Millers were less subject to North Germany competition than in 1888, and a constant demand also prevailed; but prices, on the other hand, were less favourable.
- Wine.** The 1889 crop proves, in Rhenish Bavaria, at least, to be of fair and useful quality. The high prices that were quoted at first had a beneficial influence on the stocks of previous years, the more so since the expectations founded on the new vintage turned out to be overrated.
- The import of wine from foreign parts, particularly from Italy, has notably increased.
- Coal.** The trade enjoyed an exceptionally favourable year, since large contracts had been closed previous to the outbreak of the various strikes in the coal districts, and market prices rose continually.
- Iron and metals.** These trades also report satisfactory results, owing to the protection afforded by the formation of syndicates in the chief metal districts.
- Machinery.** Machine makers and founders also report satisfactory results, a considerable business having been done for export account. Machine making, already one of the chief branches in this district, has been recently still further developed by the starting of some new large works.
- Quinine, antipyrine, chloral-acetine, which met with a normal sale throughout the greater part of the year, enjoyed towards the close, in consequence of the influenza epidemic, a very large demand.
- Sugar.** To this branch of industry the first half of the business period 1888-89 was favourable; during the second half it suffered, however, from reckless speculation.
- Beer.** Brewers again enjoyed a good business year. As regards this district, however, it would seem that the quantity of beer produced has almost reached its limit, owing to the very large consumption of beer from the interior of the empire.

Although the leaf tobacco business could not boast of encouraging results during the period under report, cigar factories had plenty of work during the year, and at times so great was the pressure that sufficient skilled labour could not be found to meet the demand. Prices, however, are now reported to be depressed. Tobacco and cigars.

This industry enjoyed a yet larger production even than in the foregoing year, the activity in the building trade continuing as great as before. Portland cement.

Great efforts were made by Mannheim firms to further develop this branch of business by the construction of tank-boats on the Rhine, and also of large reservoirs capable of storing 2,000,000 litres of oil. Petroleum.

The manufacture of cocoa-butter was less remunerative than usual, owing to a deficiency of raw material; and the same applies to oil-crushing, in consequence of short crops of seed. The cocoa-butter industry may nevertheless be said to be prospering, having reached a production of 3,000 kilos. a day, equal to 6,000 lbs. A license for this manufacture is said to have been granted to a Dutch company for Holland and Great Britain and dependencies. Cocoa-butter and vegetable oils.

Oak and pine logs, as also sawn stuff, increased in price, but profits were largely reduced by the very high prices in the forests. The shipment of timber to Holland, that was formerly very large, has, for some time past, been continually diminishing, and there is apparently no hope of its early revival. Timber.

Our local factory, the largest of that kind in Europe, continues to extend its operations. Wood pulp and cellulose

The shipping business, and consequently also our local big navigation companies, suffered severely from the effects of the various strikes in the coal districts, and also, though in a lesser degree, from the strikes in the London and Rotterdam docks. These circumstances, combined with the reduced shipments of grain, largely diminished the companies' profits. The same applies to the forwarding business in general. Rhine navigation.

The yield of crops may be termed an average one. Wheat gave but a middling result, while oats and barley succeeded better. Rye, hay, and fodder were plentiful. Clover, lucerne, and esparsette yielded very well; in the plain of the Rhine even above the average. Potatoes gave a satisfactory result, while hemp, flax, and poppy gave a fair crop; and the same may be said of hops, beetroot, and turnips. Tobacco turned out satisfactory in the southern and first-rate in the northern districts (Bad. Pfalz) of the Grand Duchy. The vintage proved deficient in quantity, and also the quality can only be taxed as middling. The experience that one abundant crop of fruit is rarely followed by a second was proved to be true again. Cherries were below the average, and also plums; while pears and apples were almost a total failure, and only nuts and chestnuts reached the average. The crops in the Grand Duchy.

SPECIAL BRANCHES.

Breadstuffs.

For almost the whole period under report, the grain trade enjoyed considerable activity. During the first three or four months the usual hesitation prevailed in the market, since consumers, as long as they did not consider themselves sufficiently posted as regards the presumptive result of the new crops, bought only sufficient to cover immediate requirements. The first reports from Austria, Hungary, and South Russia received in June spoke of great dryness, and favoured anticipations of shortcomings in the respective harvests. This was confirmed by news from other quarters, and merchants and consumers early turned their attention to Russia, the produce of which was bought in considerable quantities at rising rates. Roumania, however, the only country which enjoyed a really good harvest, yielded a sufficiently large export of grain both by sea and river (Danube) to prevent prices being excessive. A trial purchase of American Redwinter not proving satisfactory, this description did not attract the Mannheim market.

The sales for home consumption in the neighbouring Palatinate and Würtemberg were considerable in amount, owing to deficiencies in the crops. Switzerland also participated largely, while through the medium of Mannheim merchants Bavaria was supplied to some extent direct by the Danube from the producing countries. The increase in the prices of wheat and rye may be taken at about 2 marks per 200 lbs. In barley there was also some activity. Owing to short supplies, rates for Hungarian and Bohemian barley rose appreciably, and brewers consequently gave the cheaper Roumanian descriptions a trial, and this turning out satisfactory considerable quantities were imported, and the business developed to an unexpected extent. Towards the end of the year the grain market grew calmer. Consumers, apparently not being inclined to make large purchases, assumed an attitude of reserve; but as a considerable amount of grain is still required to cover the deficiency in the local crops a rather brisk business may be confidently looked forward to in the spring.

Prices at the end of the year were as follows:—

	Per 200 Lbs.			
	Value.		Equal.	
	Marks	pf.	s.	d.
Wheat, Palatinate	21	50	21	6
„ North German	21	50	21	6
„ Roumanian	20	50	20	6
„ „	21	75	21	7½
„ I. Russian Asima	22	0	22	0
„ I. „ Ghirka	21	50	21	6
„ American Redwinter ..	21	75	21	7½
Rye, Roumanian	18	50	18	6
„ Russian	18	50	18	6
Barley (home-grown) ..	20	50	22	0
„ Roumanian	16	0	19	0

Almost the whole of the 1887 home crop already was bought up in January by merchants and consumers, as stated in our report for 1888. Later on, however, these 87 tobaccos remained entirely neglected, while the 1888 product rose in favour, and considerable quantities changed hands in May and June. During the month of July business on the other hand was slack, and the promising state of the plantations did not facilitate the sale of the old stocks. The new leaf showed a development four weeks in advance of the corresponding period of the previous year, and the picking of the leaves would consequently begin in Rhenish Bavaria at the end of July. Towards the middle of August the so-called early tobaccos were almost everywhere being harvested. The extremely favourable reports which came in from almost all the tobacco districts in succession reacted of course on the prices of the remaining 1888 stocks; while those of the 87 tobaccos were already so low that they remained uninfluenced. The new sandleaf (Sandblätter) fetched per 100 lbs., even while almost green, 16 marks 24 pf. (tax unpaid), and the same description from better districts obtained as much as 30 marks. Owing to the high appreciation of the new crop, the fresh leaf-tobaccos, properly so-called, were later on also bought up while yet green and at high rates. The wet, unfavourable weather during the month of August, and repeated night frosts in September, did not interfere with the eagerness of purchasers, and the good opinion generally entertained concerning the new crop. By the beginning of October almost all the districts in the Neckar Valley and Central Baden had sold the whole of their production at prices from 30 marks 32 pf. per 100 lbs. At this time business in the old stocks had almost entirely ceased. When, however, about the middle of October, the fine well-coloured autumn tobaccos came into the market they commanded as much as 30 marks 42 pf., according to quality, and a demand set in for the old tobaccos, and several thousand hundred-weights were eagerly bought by merchants and speculators at 28 marks 30 pf. The tobaccos of the "Gundi" districts fetched 20 marks to 30 marks. They turned out leafy, and of fine colour, but of strong flavour. With the sale of the produce of the "Bergstrasse" districts in December, at 18 marks 27 pf. per cwt. of 100 lbs., the purchasing season of the 1889 crop may be considered as having terminated.

The figures of the remaining stocks of old tobaccos at this period proved clearly that the consumption of foreign tobaccos had developed largely at the cost of the home product. The extent of land devoted to the culture of tobacco in Germany was, according to official returns in 1888, 18,016 hectares, against 17,400 hectares in 1889, showing a falling-off during the last 10 years, which is hardly compensated for even by a crop so exceptionally favourable, both in quality and quantity, as that of 1889.

Cigar-making was particularly remunerative during 1889. Cigar-making.

Many factories were scarcely able to meet the number of orders received. But while the consumption within the empire has risen considerably, the export has evidently gone back, and it appears that the formerly flourishing trade of this country has lost most of its outlets. Nevertheless a number of the existing factories were in 1889 compelled to increase their plant, and even create branch establishments.

Hops.

The tendency of our market remained steady and firm up to the summer months, when the congenial weather, promising a vigorous sale of beer, some activity set in, and the already reduced stocks of 1888 hops were quickly placed, good quality fetching in July 110-139 marks per 100 lbs., middling 50-60 marks, prices which were willingly paid until the promising appearance of the young plant gradually made its influence felt, and all attention was concentrated on the coming crop. This turned out fairly satisfactory. Although the weather did not seem particularly favourable, the frequent changes from periodical wet to intense heat did not interfere with the growth and ripening of the plant; and eventually the crop, in quantity at least, was an excellent one.

First-class heavy hops were scarce. Owing to the large quantities at once brought into the market, prices at first ruled low. According to quality 50, 40, 30, 20 marks was paid, and the sale proceeded very actively, brewers participating largely in storing the healthy, cheap materials. The early picking season (14 days earlier than usual) gave the German crop the advantage of being first in the market. England made chief use of the opportunity, while buyers from the United States, which enjoyed as favourable a crop as this country, bought reservedly and only at low prices. Towards the end of the year it appeared that either the quantity harvested had been overrated, or that the consumption had been under-estimated. In point of fact, however, planters had sold almost their whole production, while the stocks in dealers' hands were considerably smaller than supposed. Prices therefore rose from 20-50 per cent.

Statistics have since shown that both as regards exports and home consumption the hop-crop of 1889 largely exceeded the average of a number of years past.

Beer.

The results of the period under report were not so good as in preceding years. This is to be attributed chiefly to the deficiency in the 1888 barley crop. Owing to the unsatisfactory yield, both in quality and quantity, our brewers were obliged to import the greater part of their barley from foreign countries, chiefly Austria.

Nevertheless, two of our most extensive breweries raised their production about $4\frac{1}{2}$ per cent., the larger making 121,100 hectolitres (the hectolitre about 22·3 gallons), and the other 49,200 hectolitres. Experience, however, showed that this increase was not in accordance with the consumption of local beer, which was either stationary or had positively diminished, owing to the strong competition of beer brewed in other parts of Germany.

Tax was paid as follows :—

	Currency.		Sterling.	
	Marks	pf.	£	s.
On local beer	624,389	40	31,218	9
On other beer	140,386	81	7,019	6

On beer exported to foreign countries a remission of duty, amounting to 112,021 marks 50 pf. (5,601*l.* 1*s.*), was allowed.

It is too early to obtain a true estimate of the vintage of 1889. Wine. It may, however, be stated that the product promises to be a good and useful article of consumption. The changeable weather during September, the decisive month preceding the vintage, which ought to have been warm and dry, interfered to some extent with the ripening of the grape. Owing to this, the product at least of the less favourably situated vineyards shows a certain degree of acidity. That the general yield turned out a good average one is to be attributed to the favourable weather during the blossoming period. The quantity of wine produced is generally estimated at about one-third to one-fourth of a full vintage.

As soon as a tentative opinion regarding quality and quantity of the yield was at all feasible, the following prices for the new wine were asked and paid, at least at first :—

	Yield.	Currency.		Sterling.	
		Marks.		£	
Rhenish Bavaria, Upper District	$\frac{1}{4}$	400	to 500	20	to 25
„ Lower „	$\frac{1}{3}$ to $\frac{1}{4}$	500	600	25	30
„ Central „	$\frac{1}{2}$	800	1,400	40	70

Per 1,000 litres (about 223 gallons), and according to the quality.

On the whole the wine trade enjoyed better results than during the preceding year, particularly during the months of September, October, and November, when, owing to the comparatively small yield of the new vintage, a demand sprung up for small wines.

The import of cheap Italian wines again increased considerably. This must be attributed partly to the abundant vintage in Italy, partly to the tariff difficulties between Italy and France closing the large French market to Italian wines. Towards the end of the year stocks became exhausted, and prices consequently rose.

Although during the greater part of the business season Beetroot. 1888–89 trade was apparently flourishing, this was in reality chiefly owing to prices being pushed by reckless speculations. On the utter collapse of the so-called “Magdeburg Ring,” the reaction which set in during the remainder of the year was all the more severely felt.

The speculative rise of prices began in March. It was stated that the German production for 1888-89 was only 19,500,000, instead of 20,500,000 cwts., as formerly estimated, and later on the production of France and Austria had also been over-estimated. The figures of the colonial production were also questioned, and reports were spread of a deficiency of 160,000 tons. Lastly, the visible supply was made out to be smaller than at the same period in the previous year: prices consequently rose continuously. In July refined sugar in the hand of wholesale dealers reached the price of 78 marks per 200 lbs., while at the mills even 80-81 marks was demanded.

On supplies proving adequate and the deficiency illusory, the erroneous statements and deductions were estimated at their true value, and the formidable sugar ring broke up.

A reaction set in, followed by a general collapse, such as our sugar trade had never before experienced. In November refined sugar had fallen to 58 marks 50 pf., and for March delivery 56 marks. By December a recovery had been effected, refined was firm, available lots being very scarce.

The prices of raw sugar and refined sugar for the years 1888-89 were as follows:—

	Raw Sugar.*		Refined Sugar.*	
	s.	d.	s.	d.
September	38	0	60	6
October	35	0	59	7
November	34	7	58	2
December	36	6	59	8
January	36	4	59	6
February	36	2	59	0
March	40	0	64	0
April	49	0	72	0
May	52	4	76	6
June	59	6	78	8
July	58	7	78	8
August	51	0	72	8

* All per 200 lbs.

Cotton manu-
facture.

Concerning this branch of industry, we have to report an increase of prosperity in 1889.

The improvement is to be attributable to some extent to the considerable rise in price of cotton, amounting between January and October to about 20 per cent. This circumstance enabled the mills to raise their prices proportionately for tissues and yarns, and the demand being continuous and very lively, manufacturers were fully occupied the whole year, and at satisfactory prices. The largest manufacturers in this district (the company for spinning and weaving at Ettlingen) having, moreover, secured a fair stock at moderate rates in the spring, were able to do a very lucrative business in shirtings, &c.

The manufacture of velvets, on the other hand, had to be still further reduced. A considerable falling-off in the demand was

accompanied by a serious increase in the cost of make, so that manufacturers were unable to effect an improvement by reduced prices. The repeated strikes in the coal districts caused considerable inconvenience, some mills being at times forced to stop work almost entirely, and goods could be delivered only after delay.

In consequence of the increased home consumption, the export of cotton manufactures to foreign countries from this district has been diminishing for some years past, and last year was almost entirely suspended.

Respecting these branches of industry in our district there is ^{Indiarubber,} not much to be said. They shared to a certain extent in the ^{celluloid, and} general prosperity, and enjoyed a fair sale for their products. ^{asbestos.} Strong competition did not, however, allow them to raise their prices in proportion to the increased cost of production. So their profits were greatly reduced. The production of celluloid cuffs and collars is proceeding satisfactorily, and in respect to these articles better prices also are being realised since the formation of a convention between the leading establishments in South and North Germany.

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Nº. 631.
DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

GERMANY.

REPORT ON THE
BUDGET OF THE GERMAN EMPIRE, 1890-91.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 184.

*Issued during the Recess and Presented to both Houses of Parliament
by Command of Her Majesty.*

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Reference to previous Report, Annual Series No. 184.

GERMANY.

BERLIN.

Sir E. B. Malet to the Marquis of Salisbury.

My Lord,

Berlin, December 6, 1889.

I HAVE the honour to transmit to your Lordship, herewith, Mr. Trench's Report on the Budget of the German Empire for 1890-91.

I have, &c.

(Signed) E. B. MALET.

Report on the Budget of the German Empire for 1890-91.

The Budget for the financial year 1890-91 provides for an Expenditure of 1,208,664,739 marks* (about 60,433,236*l.*), made up of ordinary expenditure, 849,614,835 marks (42,480,741*l.*), and extraordinary, 359,049,904 marks (17,952,495*l.*), and extraordinary.

A similar amount is credited to the account of the Empire as Revenue. revenue to be derived from the proceeds of customs duties, indirect taxes, and administrative receipts of the Empire, these forming its staple sources of revenue. The deficiency is made up by contributions from the Federal States, and out of the proceeds of a loan, the raising of which is now under discussion in the Reichstag.

The annexed tables I. and II. give the chief items of expenditure and revenue in the present Budget, and the corresponding figures for the financial year 1889-90.

A comparison of the two Budgets shows that the estimated expenditure for 1890-91 exceeds that of 1889-90 by 12,030,542*l.* The increase in the ordinary Budget is 1,928,916*l.*, and in the extraordinary 10,101,626*l.* Comparison of present and past Budget.

Commencing with the expenditure, we find the financial year 1890-91 debited with a heavy deficit. It amounts to 1,009,936*l.*, but is 124,882*l.* less than the deficit debited to the Budget of 1889-90.

* Marks are converted into English money at the rate of 20 marks to the pound sterling.

Items I., II. and III. have undergone no change, and, therefore, call for no remarks.

Foreign Office. There is an increase in the ordinary expenditure of the Foreign Office of 15,833*l.*, and a decrease in the extraordinary expenses of 57,260*l.* Details of increases and decreases are given in table III.

Home Office. The ordinary vote asked for the Home Office is 7,160*l.* in excess of that for 1889-90, and is necessitated by an increase in the number of employés and servants and of salaries and office expenses.

The extraordinary expenditure is estimated at 1,292,831*l.*, or 542,722*l.* more than in 1889-90. The chief items are:—

	£
Cost of cutting canal between the North Sea and the Baltic ..	1,180,000
Construction of the new Reichstag Building	90,000
Construction of Patent Office, fourth and last instalment ..	17,400
Fish Breeding Establishment at Hünigen.	1,231

War Office and Army. The amount required for the War Office has increased by 331,450*l.* ordinary, and the large sum of 7,960,794*l.* extraordinary expenditure. Details of this vote will be found in table IV.

Naval Department and Navy. The increase in the estimate for the Naval Department is 127,713*l.* ordinary, and 1,756,040*l.* extraordinary expenditure. For details see table V.

Justice. There is a small increase of 425*l.* in the ordinary expenditure of the Ministry of Justice. In the extraordinary expenditure there is a decrease of 15,000*l.* in the amount required for the building of the new Supreme Court of the Empire.

Treasury. The ordinary expenditure of the Treasury shows an increase of 838,765*l.*, and the extraordinary a decrease of 139,885*l.* The vote consists, as usual, mainly of the sum required to be disbursed for the Federal States out of the proceeds of the customs, tobacco and stamp taxes, of a contribution of 200,000*l.* to Hamburg for cost of joining Tariff Union, and of a sum of 150,000*l.* which is placed at the disposal of the Emperor for gifts and charities.

Railways. The vote for the ordinary expenditure of the Railway Department is 14,991*l.*, or only 80*l.* more than in 1889-90.

Debt of the Empire. The Service of the Debt takes a little over 450,000*l.* more than in 1889-90. The Debt is made up of a 4 per cent. loan of 22,500,000*l.*, and of loans, bearing 3½ per cent. interest, amounting to 37,396,857*l.* The annual interest on the 4 per cent. loan amounts to 900,000*l.*, and is shared as follows:—

	£
Contributions from all Federal States	623,232
" " States, except Bavaria	158,305
" " " " and Wurtemberg	118,463
Total	900,000

The sum total of the 3½ per cent. interest is 1,308,890*l.*, and is shared as follows:—

	£
Contributions from all Federal States	1,255,579
" " States, except Bavaria	38,311
" " " " and Wurtemberg	15,000
Total	1,308,890

The annual interest on the Debt amounts to 2,208,890*l*.

Including the amount of the new loan for 12,339,465*l*. about to be issued, the total Debt of the Empire will be 72,236,322*l*.

The vote asked for the General Pensions' Fund shows an increase of 172,386*l*. General pensions.

The amount required for this Fund shows a reduction of 16,848*l*. Invalid fund.

The imperial revenue for 1890-91 is made up as follows:—

Revenue,
1890-91.

	£
From ordinary sources	33,063,930
Federal contributions	13,484,291
Extraordinary revenue	13,885,015
Total	60,433,236

The corresponding figures of 1889-90 were:—

Revenue,
1889-90.

	£
Ordinary revenue	32,195,487
Federal contributions	11,406,634
Extraordinary revenue	4,800,673
Total	48,402,694

For details of revenue see table II.

Taking the chief items in order, the total proceeds of the customs and excise show an estimated increase of 465,636*l*. The customs receipts, by themselves, are estimated to produce 636,100*l*. more than 1889-90. Customs and excise.

In regard to this item it must, however, be borne in mind that the Treasury can only dispose of 6,500,000*l*. out of the total receipts of the customs and tobacco tax for imperial purposes; all receipts in excess of that amount have to be handed over for distribution among the several Federal States. This distribution is made on the same principle of assessment as is employed in assessing Federal contributions. The total net proceeds of the third heading of the stamp duties are similarly handed over by the Treasury to the Federal States for their own use. Part of receipts paid over to Federal States.

A small increase of 1,395*l*. is expected under this heading. Tobacco tax.

The sugar tax is estimated to yield 101,800*l*. less than in 1889-90. Sugar tax.

An increase of 34,400 is expected in the receipts from the salt tax on salt. Salt tax.

A falling-off under this heading of 274,400*l*. is anticipated. Brandy tax.

The increase in the stamp duties is expected to amount to 114,850*l*. Stamp duties.

Posts and telegraphs are expected to yield an increased revenue of 174,240*l*. Posts and telegraphs.

The estimated receipts from this source are slightly higher than in the last Budget. Printing office.

Railways are expected to yield about 40,045*l*. more than in 1889-90. Railways.

The Empire's share in the net profits of the Imperial Bank is a trifle lower than in the preceding financial year. Imperial Bank

There is an estimated increase of 116,614*l*. in the receipts from the different administrative departments. Administrative departments.

Items VIII., IX., and X., have undergone very little change. Federal contributions are put down at 13,484,291*l.*, as against 11,406,634*l.* in 1889-90, showing an increase of 2,077,657*l.*

The extraordinary revenue amounts to 13,885,015*l.*, showing an increase of 9,084,442*l.*, as compared with the last financial year. It will be chiefly made up from the proceeds of a new loan, by the issue of Treasury bills, and by the sum of 380,000*l.* received from Prussia as her contribution to the cost of cutting the new canal between the North Sea and the Baltic.

The Reichstag has been asked to sanction the raising of a loan for 12,339,465*l.* for providing for the extraordinary expenditure of the army, navy, and railways, and postal and telegraph services.

Up to April 1 last, the Civil List of the King of Prussia (he receives none as Emperor) amounted to 610,965*l.* per annum. From that date it was raised to 785,965*l.* a year.

This total is obtained as follows :—

Receipts from crown lands and forests	..	..	..	£	385,965
Voted by the Prussian Parliament	..	..	..	£	400,000
Total	..	..	..	£	785,965

Table I.—BUDGET of Imperial Expenditure of 1890-91 compared with 1889-90.

Items.	1890-91.		1889-90.	
	Ordinary.	Extra-ordinary.	Ordinary.	Extra-ordinary.
	£	£	£	£
I. Federal Council*	...	...	...	...
II. Reichstag	19,169	...	19,169	...
III. Imperial Chancellor and Chancery	7,398	...	7,398	...
IV. Foreign Office	441,776	22,940	425,943	90,200
V. Home Office	425,819	1,292,832	418,669	749,909
VI. War Office and Army	18,840,041	12,198,108	18,508,590	4,237,314
VII. Naval Department and Navy	1,914,379	2,624,679	1,786,666	768,639
VIII. Department of Justice	93,004	7,500	92,679	22,500
IX. Treasury Department	15,176,463	217,410	14,336,698	337,295
X. Railway Department	14,992	245,625	14,912	167,895
XI. Service of Debt of Empire	2,331,125	...	1,879,175	...
XII. Court of Account	27,752	...	27,752	...
XIII. General Pensions	1,897,923	...	1,726,642	...
XIV. Invalid Fund	1,291,895	...	1,308,742	...
XV. Post and Telegraphs	...	409,557	...	286,343
XVI. Printing Office	...	23,907	...	35,950
XVII. Deficit of Budget, 1888-89	...	1,009,937	...	(1887-88) 1,134,824
Total	42,480,741	17,952,495	40,551,826	7,850,869

Total ordinary 60,433,236*l.*, and extraordinary, 48,402,694*l.*

* The expenditure of the Federal Council is included in the sum asked for the Home Office.

Table II.—BUDGET of Imperial Revenue for 1890–91, compared with 1889–90.

	Revenue Budget of 1890-91.	Revenue Budget of 1889-90.
I. Customs and excise—	£	£
(a.) Zollverein taxes shared by all the States of the Zollverein:—		
1. Custom's duties	14,276,100	13,540,000
2. Tobacco tax	515,100	501,150
3. Sugar „	2,467,700	2,569,500
4. Salt „	2,050,000	2,015,600
Not common to all States:—		
5. Brandy	6,492,200	6,766,600
6. Beer	1,067,100	1,009,750
(b.) From territories outside the Zollverein:—		
1. Taxes common to all States	1,753	1,717
2. Not common „ „	4	4
II. Stamp duties—		
1. On playing cards	57,150	55,100
2. Bills of Exchange	320,650	316,300
3. { (a.) On shares, rents, and bonds	288,450	224,400
(b.) Sales and similar transactions	454,000	411,450
(c.) 1. Lotteries (state)	355,450	331,000
2. „ (private)	28,600	31,200
4. Statistical	29,650	29,300
III. Posts and telegraphs—	£	
Gross receipts	10,941,034	
Expenses	9,305,073	
	1,635,961	1,461,721
IV. Printing office—		
Gross receipts	230,400	
Expenses	171,606	
	58,794	57,508
V. Railways—		
Gross receipts	2,549,450	
Expenses	1,549,300	
	1,000,150	960,105
VI. Imperial Bank—		
Empire's share of net profits	68,000	84,500
Tax on uncovered amount of bank notes ..	1,175	1,250
VII. Sundry receipts from different Administrative Departments	576,774	460,159
VIII. Invalid Fund	1,291,895	1,313,367
IX. Interest on capital.. .. .	26,950	31,800
X. Sale of portions of the former Stettin Fortress ground	20,323	22,006
XI. Federal contributions	13,484,292	11,406,634
XII. Extraordinary revenue	13,885,015	4,800,573
Totals	60,433,236	48,402,694

Table III.—FOREIGN Office Budget.

This vote, which includes Diplomatic, Consular, and Colonial Services of the Empire, shows an increase in the ordinary expenditure of 15,833*l.*, accounted for as follows:—

1. FOREIGN OFFICE.							£
Increase of staff, house allowances, &c.	..	..	..	..	..	..	4,675
2. DIPLOMATIC.							
Increase of Salaries—							
Athens, Minister	..	..	..	..	..	..	300
„ Secretary	..	..	..	..	..	..	60
Belgrade, Dragoman	..	..	..	..	..	..	45
„ Chancellor	..	..	..	..	..	..	45
Buenos Ayres, salary of Secretary of Legation	..	..	..	..	..	..	500
„ increase for Chancellor	..	..	..	..	..	..	45
Rio de Janeiro, Chancellor	..	..	..	..	..	..	45
Santiago, Chancellor	..	..	..	..	..	..	75
Vienna, Chancery Servant	..	..	..	..	..	..	15
Total	..	..	..	..	..	..	1,130
3. CONSULAR.							
New Consulate General—							
Batavia, Consul-General	..	..	..	..	..	..	2,000
„ Secretary	..	..	..	..	..	..	450
New Consulates—							
Bâle, Consul	..	..	..	..	..	..	600
„ Secretary	..	..	..	..	..	..	200
Hong Kong, Consul	..	..	..	..	..	..	1,200
„ Secretary	..	..	..	..	..	..	300
New Vice-Consulate—							
Chefoo, Vice-Consul	..	..	..	..	..	..	750
Increase of salaries—							
Sofia, Dragoman	..	..	..	..	..	..	50
St. Petersburg, Consul	..	..	..	..	..	..	300
Piræus, salary for Secretary	..	..	..	..	..	..	180
Total	..	..	..	..	..	..	6,030
Deduct for abolition of Hong Kong Vice-Consulate	..	..	..	..	..	..	1,050
Total	..	..	..	..	..	..	4,980
Total increase, Foreign Office, Diplomatic, and Consular	..	..	..	..	..	..	10,785
4. COLONIAL SERVICE.							
New Guinea Company Protectorate—							
Commissioner	..	..	..	..	..	..	1,500
Chancellor	..	..	..	..	..	..	750
Secretary	..	..	..	..	..	..	375
5. SUNDRY EXPENSES.							
Maintenance of offices and gardens, and sundry other expenses	..	..	..	..	..	..	2,300
Archæological institutes at Rome and Athens	..	..	..	..	..	..	123
Total increase of permanent charges	..	..	..	..	..	..	15,833

As regards East Africa Supplementary Estimates will be presented to the Reichstag, 95,500*l.* will be required for the increased expenses of Major Wissmann's Expedition, and a sum of 13,900*l.* will be asked for to enable the Government to strengthen the German Forces in Africa.

Table III.—continued.

The extraordinary expenditure under this vote shows an	£
increase in certain items of	8,840
A decrease in others of	76,100
Total decrease	67,260
The decrease is accounted for by the disappearance from the present Budget of the following extraordinary charges in 1889-90:—	
Purchase of ground for Consular-General at Yokohama ..	1,650
Enlarging Embassy House at Petersburg	2,250
Purchase of Legation House at Brussels	12,200
Vote for the suppression of the slave trade, and for the protection of German interests in East Africa	60,300
Total	76,100
The increase is made up of increased subvention to Dr. Dohrus' Zoological Station at Naples.. ..	
Increase of police forces in German South-west African Protectorate	8,840
Total	8,840
In other respects the vote remains unaltered from 1889-90, its total amount being:—	
Permanent	441,776
Extraordinary	22,940
Total	464,716

Table IV.—WAR Office.

The estimated ordinary expenditure of 1890-91, exceeds that of 1889-90 by 331,450*l.*, and the extraordinary expenditure by the large sum of 7,960,794*l.*

The principal items of ordinary expenditure are:—

	£
Pay of troops	5,520,534
Feeding of troops	4,271,842
Clothing	1,154,929
Garrison Administration	1,942,740
Artillery and arms equipment	780,846
Lodging allowances	429,197
Purchase of re-mounts	329,991
Medical establishments and services	325,766
Military and training colleges	271,544

The total ordinary cost of maintaining the army is:—

Prussian, Saxon, and Wurtemberg army	16,660,647
Bavarian army	2,179,393

Total ordinary expenditure of German army .. 18,840,041

The extraordinary expenditure consists of:—

I. (a.) Supplement to ordinary Budget of Prussian, Saxon, and Wurtemberg army	8,381,771
(b.) To complete equipment of Bavarian Army	1,096,427
Total.. .. .	9,478,198

II. Fortification works, extension of railways, new barracks, arms and accoutrements, &c.	2,719,910
---	-----------

Total of extraordinary expenditure of German army.. 12,198,108

Total ordinary and extraordinary cost of the German army 31,038,149

Table V.—NAVAL Estimates.

The ordinary expenditure for 1890–91 is estimated at 1,914,379*l.*, being an increase of 147,713*l.*, as compared with the Budget of 1889–90.

The chief items of expenditure are:—

	£
Dockyards	517,484
Naval Establishment	472,157
Ships in commission	342,915
Commissariat	140,398
Artillery and fortifications	108,141
Torpedoes and mining apparatus	78,182
Naval Department	37,767

The extraordinary expenditure is put down at 2,524,679*l.*, or 1,756,040*l.* in excess of that of the last financial year.

The chief items are:—

	£
Construction of new ships of war, including a new Imperial yacht	1,921,800
Re-arming, &c., of old men-of-war	236,300
Torpedoes	62,735
Construction of new, and repair of old Naval establishments, docks, and powder magazines	132,727
Munitions of War	75,000

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REPORT FOR THE YEAR 1889-90
ON THE
FINANCES OF WURTEMBERG.

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554. Buenos Ayres	1½d.	617. Odessa	1d.
555. San Francisco	2½d.	618. La Rochelle	1d.
556. Carthage	½d.	619. Rome	1d.
557. Syra	1d.	620. Nice	1d.
558. Varna and Bourgas	1d.	621. Kiukiang	½d.
559. Thessaly	½d.	622. Paris	1d.
560. Yokohama	1d.	623. Salonica	1½d.
561. Nantes	1½d.	624. Réunion	1d.
562. Suakin	½d.	625. Ichang	1d.
563. Algiers	1d.	626. Bogotá	1d.
564. St. Petersburg	2½d.	627. Malaga	2d.
565. Soul	1d.	628. Porto Rico	1d.
566. Newchwang	1d.	629. Bushire	2½d.
567. Roustchouk and Philippopolis	1d.	630. The Hague	½d.
568. Stockholm	1½d.	631. Berlin	1d.
569. Tonga	1d.	632. Adrianople	1½d.
570. Chicago	1½d.	633. Rome	1½d.
571. Adana	½d.	634. Santiago	½d.
572. Buenos Ayres	3d.	635. Tahiti	½d.
573. Frankfort	1½d.	636. Maranhão	½d.
574. Canton	1½d.	637. Mexico	2d.
575. Tamsui	5½d.	638. Christiania	1d.
576. Palermo	3d.	639. Copenhagen	1d.
577. Amsterdam	1d.	640. Paris	1d.
578. Ajaccio	½d.	641. Venice	1d.
579. Shanghai	1½d.	642. Cherbourg	½d.
580. Warsaw	½d.	643. New York	1d.
581. Teneriffe	1d.	644. Patras	1d.
582. Tangier	2d.	645. Bourgas	½d.
583. Surinam	½d.	646. St. Petersburg	3d.
584. Loanda	1d.	647. Taganrog	½d.
585. Alexandria	1d.	648. Baltimore	1½d.
586. Cagliari	1d.	649. New Orleans	2d.
587. Smyrna	½d.	650. New Orleans	1d.
588. Mannheim	1d.	651. Samos	½d.
589. Nagasaki	1d.	652. Buda-Pesth	1½d.
590. Hakodate	1d.	653. Tripoli	½d.
591. Bushire	1d.	654. Buenos Ayres	½d.
592. Chinkiang	½d.	655. Paris	1d.
593. Pakhoi	1d.	656. Cherbourg	1d.
594. Hiogo	1½d.	657. Warsaw	½d.
595. Bangkok	1d.	658. Rome	1½d.
596. Serajevo	1d.	659. Saigon	½d.
597. Copenhagen	1½d.	660. Buenos Ayres	½d.
598. Cephalonia	½d.	661. Galveston	1d.
599. Chefoo	½d.	662. Galatz	1½d.
600. Guatemala	1½d.	663. Antwerp	1d.
601. Tonga	½d.	664. Boston	1d.
602. Tahiti	1d.	665. Madeira	½d.
603. Stettin	2d.	666. New Hebrides	½d.
604. Vera Cruz	1½d.	667. Riga	1d.
605. Christiania	4d.	668. Charleston	1d.
606. Pernambuco	1½d.	669. Algiers	2d.

No. 670.

Reference to previous Report, Annual Series No. 220.

GERMANY.

STUTT GART.

Sir H. Barron to the Marquis of Salisbury.

My Lord,

Stuttgart, February 19, 1890.

WITH reference to your Lordship's circular of March 2nd, 1889, I have the honour to transmit herewith a Report on the Finances of Wurtemberg, drawn up by Lord Vaux of Harrowden.

I have, &c.

(Signed) H. BARRON.

Lord Vaux of Harrowden to Sir H. Barron.

Sir,

Stuttgart, February 12, 1890.

I have the honour to submit a report on the budget of the Kingdom of Wurtemberg for the current financial year, *i.e.*, April 1st, 1889, to March 31st, 1890. In this report, except where the contrary is stated, the figures are given in German marks, the intrinsic value of which is 20·40 marks to the English sovereign, the value in exchange is, however, I am informed, generally slightly below this figure, say 20·30 marks. For the sake of simplicity in this report, I have, whenever necessary to convert marks into pounds, or the reverse, reckoned 20 marks as being equal to 1*l*. Fractions of marks have also been disregarded throughout.

The following table shows the total estimated receipts and expenditure for the past and for the current financial years:—

Estimated receipts and expenditure for 1888-89 and 1889-90

Estimates.	1888-89.	1889-90.	Difference in 1889-90.
	Marks.	Marks.	Marks.
Receipts.. .. .	58,597,885	61,184,219	+ 2,586,334
Expenditure	68,634,237	68,128,489	- 510,798
Results	-36,352 Deficit.	+ 3,060,780 Surplus.	3,097,132 Difference in favour of cur- rent year.

From this table it appears that, according to the estimates, the current year shows an improvement of 3,097,132 marks (154,856*l.*) over the past year, the receipts being 2,586,334 marks greater, and the expenditure 510,798 marks less than last year, there being, consequently, an estimated surplus this year of 3,060,780 marks as against an estimated deficit last year of 36,352 marks. I should, however, state that, in consequence of changes in some of the estimates for 1888-89, the deficit which was contemplated was very largely diminished, if not entirely avoided. The accounts of last year not having yet been made up, it is impossible for me to state what the final results for that year may have been. Even if the original estimates had been maintained the amount of the deficit would have been very small, about 1,817*l.*, so that practically the year 1888-89 may be said to have resulted in financial equilibrium.

Sources of
revenue.

I now turn to the sources of revenue of the kingdom of Wurtemberg, and the amount they are estimated to produce in the current year. The accompanying table shows the chief heads from which these revenues are derived—

Heads of Revenue.	Estimates 1888-89.	Estimates 1889-90.
	Marks.	Marks.
Domains—		
Crown Lands (Kameralämtern)	693,880	686,970
Forests, shootings, wood, etc.	5,245,490	5,209,168
Mines and ironworks	100,000	150,000
Salt mines	400,000	250,000
Revenues derived from Profits on means of communication (Verkehrsanstalten)—		
Railways	13,413,190	14,935,400
Posts and telegraphs	1,431,593	1,707,450
Steamers on the Bodensee	8,574	4,000
Mint	12,400	12,200
Miscellaneous Revenues at the Staatshauptkasse ..	993,509	886,171
Total of the Crown Properties (Kammergut)—	22,208,637	23,958,359
Direct Taxes—		
Land, buildings, and trades (except itinerant trades)	8,456,575	7,651,930
Itinerant trades	20,000	20,000
Capital, rents, and incomes (professional or otherwise)	5,051,600	4,581,400
Indirect Taxes—		
Excise	1,456,000	1,456,000
Dog tax	213,600	233,500
Tavern licenses	9,700,800	8,681,500
Judicial fees, succession and donation duties ..	2,522,000	2,617,000
Share of the Imperial customs duties and tobacco, spirit and stamp duties	6,482,670	11,984,530
Contribution from the Restverwaltung*	2,486,002	..
Total of Taxes	36,389,248	37,225,860
Total of the Kammergut	22,208,637	23,958,359
Total Revenue	58,597,885	61,184,219

* Surplus of previous years.

There are two principal sources of revenue, 1st the Kammergut, or crown properties, 2nd taxation.

The Kammergut is estimated to produce this year a sum of 23,958,359 marks, being an improvement on the estimates of last year (22,208,637 marks) of 1,749,722 marks. Almost the whole of this improvement is due to the estimated increase of the railway receipts, which are expected to produce 14,953,400 marks, as against 13,413,190 marks in 1888-89, being an increase of 1,540,210 marks. The only other heading under the Kammergut, which shows a notable increase, is the posts and telegraphs, which are expected to produce 1,707,450 marks in 1889-90, against an estimate of 1,431,593 marks in 1888-89, being an increase of 275,957 marks. The other items which are estimated to produce more in the current year than in the past, are the forests and shootings, estimated at 5,309,168 marks, against an estimate of 5,245,490 marks in 1888-89, being an increase of 63,678 marks, and mines and iron-work, which are expected to produce 50,000 marks, more than the estimate of 1888-89. Every other item of the Kammergut is estimated at a lower figure for 1889-90 than that for 1888-89. In most cases the reduction is

Estimate of receipts from the Crown properties.

not large, the most serious being in the receipts from the salt mines which are expected to produce only 250,000 marks this year, against an estimate of 400,000 marks last year, being a reduction of 150,000 marks. The Crown lands are estimated to produce 6,910 marks less than last year. The Bodensee steamers are put at a figure which is 4,575 marks less than in the last year's estimates. The Mint is expected to produce 200 marks less than it was expected to produce in 1888-89, and the miscellaneous revenues of the Kammergut are estimated at 885,171 marks this year, against an estimate of 903,509 marks last year, being a reduction of 18,338 marks.

Increase of 10
per cent. in
railway re-
venue.

The decrease under these heads, therefore, amounts to 2,224,168 marks in 1889-90 as compared with 1888-89. On the other hand, the forests, etc., and the mines and ironworks are expected to produce 113,678 marks more than in the previous year, and the remainder of the decrease, together with an increase of 1,749,722 marks, is expected to be realised by profits on the railways and posts and telegraphs. Whether the result will justify this expectation is impossible to foretell, the estimated increase of something over 10 per cent. in the net receipts of the railways in one year appears rather sanguine.

Estimated re-
ceipts from
taxes.

Taxes on land,
buildings, and
trade.

The remainder of the revenue of the kingdom of Wurtemberg is derived from taxation, both direct and indirect.

The principal revenue from direct taxation arises from a tax levied on all land, buildings and trades, excluding itinerant trades. This tax is estimated to produce, in the year 1889-90, the sum of 7,651,930 marks, against an estimate of 8,456,575 marks in 1888-89, being a diminution of 804,654 marks. This reduction of nearly 10 per cent. on last year's estimates is entirely to be attributed to the reduction of the rate at which this tax is levied. In previous years this rate has been $3\frac{2}{10}$ per cent. on the value of the property or income from the trade; but, in future, the rate is to be $3\frac{5}{10}$ per cent., a considerable relief to the persons on whom this tax falls.

Tax on iti-
nerant trades.

The next head is that of itinerant trades, pedlars, etc., for which a sum of 20,000 marks is set down. This tax is estimated at the same amount as it was in the previous year, in spite of its being levied at the lower rate of $3\frac{5}{10}$ per cent. instead of $3\frac{2}{10}$ per cent. I proceed to give the explanation of this. It appears that, though this tax was only estimated at 20,000 marks in 1888-89, it had actually produced, in the previous two years, 32,000 marks and 33,000 marks, respectively. This was a large increase on the estimates for these years, and was mainly attributed to the fact that owing to the failure of the fruit harvest in Wurtemberg, a large quantity of foreign fruit had been imported and hawked about the country. In view of this exceptional circumstance, it was not considered advisable to raise the estimate for this year above that of previous years; but at the same time it is expected that notwithstanding the reduction in the rate of the tax, the estimate of previous years may be reached.

Tax on
capital, rents,
and incomes.

The estimated revenue for the year 1889-90 under the next head, viz., capital, rents, and incomes (professional or otherwise), is 4,581,400 marks, being 470,200 marks less than the estimate

for 1888-89 (5,051,600 marks). This large reduction is due to two principal causes, the first is that the tax in future is to be levied at the rate of $4\frac{4}{10}$ per cent. instead of $4\frac{8}{10}$ per cent. as hitherto, and the second is that the incomes of widows, fatherless minors, and certain other classes, are in future, in some cases, to be exempt from this tax. Having regard to the large allowance which has been made in the budget for the reduction in this tax, it appears probable that the estimate will be fully realised, if not exceeded.

I now turn to the revenue derived from indirect taxation, the first item of which is excise, estimated for 1889-90 at 1,456,000 marks, being the same estimate as that for the previous year. This heading does not appear to call for any particular notice, the estimates for each branch are moderate, and the estimates of previous years appear generally to have been fully realised, at the same time there does not appear to be any special reason for anticipating any great increase this year. Judging by the results of previous years it will probably be found that the estimate for the current year will be exceeded by a few hundred marks. I may add that the tax on lottery tickets, and tickets at theatres and places of amusement, is included under the above heading.

The dog tax is the next item under the head of indirect taxation, it is estimated to yield a net revenue of 233,500 marks to the State, an increase on the estimate of 1888-89 (213,600 marks) of 19,900 marks. The actual gross yield of this tax for the current year is estimated at 444,000 marks as against an estimate of 403,400 marks for last year, being an increase of 40,600 marks in the estimated gross receipts for 1889-90. The expenses of collection however, and the contribution to the local poor-rates, consume almost the half of the gross receipts. This tax has recently been raised from 7 to eight marks per dog, there is every reason to expect that the estimate for this year will be fully realised.

The next item under the head of indirect taxes is tavern licenses. This is really a tax on all beers and spirituous liquors, and is estimated to produce in the current year a sum of 8,681,500 marks, being 1,019,300 marks less than the estimate for last year, which was 9,700,800 marks. The gross yield of the tax for this year is estimated at 9,677,000 marks, as against 11,147,000 marks last year, being a reduction of 1,070,000 marks in this year's estimate. The explanation of the considerable decrease in the revenue expected to be derived from this source is as follows:—

This tax has hitherto been collected under three principal heads, viz., wine, malt for brewing, and spirits, and the proceeds of the taxes on these three articles of consumption were estimated at a gross sum of 11,147,000 in the budget of 1888-89. In consequence, however, of an imperial tax having this year been imposed on spirits, the Wurtemberg budget includes only the proceeds of the taxes on the first two of the above articles, viz., wine and malt for brewing, which are estimated to produce a gross sum of 9,677,000 marks. Last year the expenses of collection of the three taxes and the drawbacks on beer and spirits were esti-

Excise.

Dog tax.

Tavern
licenses.
Beer and
spirit tax.New imperial
tax on spirits.

mated at a sum of 1,446,200 marks, which, being deducted from the gross estimate of 11,147,000 marks, gave an estimated net revenue of 9,700,800 marks. This year, however, the drawback on spirits, estimated at a sum of 393,000 marks in last year's budget, has no longer to be provided for by the Wurtemberg government. The gross expenses of collection and the drawback on exported beer are estimated together at a sum of 1,140,500 marks for this year, in which sum is included the expense of collecting the new imperial tax on spirits. As this new arrangement had not yet come into operation at the time the budget now under consideration was being framed, it was impossible to estimate with accuracy what the expense of collecting the imperial tax on spirits would amount to, a round sum of 145,000 marks was therefore set down. This amount will be recovered from the imperial government, and has, therefore, to be deducted from the gross expense of collection, &c., viz., 1,140,500 marks, giving a net sum of 995,500 marks as the probable amount of the charge for collection and drawback on beer which the government of Wurtemberg will have to bear.

Judicial fees
and succession
duties.

The gross estimate of the yield of this tax, as I have already stated, is 9,677,000 marks, deducting from this sum the charge of 995,500 marks, as above explained, a net estimate of 8,681,500 marks is arrived at for the year 1889-90. Having regard to the amount of the actual receipts from this tax in past years, there appears to be every reason to expect that this estimate will be realised in the present year.

The estimated net receipts under the next heading, judicial fees, succession and donation duties, amount to a sum of 2,617,000 marks in 1889-90, against a sum of 2,522,000 marks in 1888-89, being an estimated increase of 95,000 marks.

The estimate of the yield of judicial fees for this year is slightly lower than that of last year, but the receipts from succession and donation duties show a remarkable increase during the past few years. The net receipts under this head during the last three years, of which the accounts are completed, are as follows:—

					Marks.
1885-86..	..	..	..	..	637,616
1886-87..	..	..	..	..	713,185
1887-88..	..	..	..	..	831,188
Total for the three years	..	..	..	..	2,185,988
Yearly average..	..	..	..	..	728,662

What would appear to be, therefore, a very moderate estimate of 700,000 marks has been inserted in this year's budget. If anything like the past ratio of increase has been maintained during the years 1888-89 and 1889-90, the actual net receipts from this source should, in the present year, amount to over 900,000 marks, that is to say, more than 200,000 marks more than the estimate.

Share of Wur-
temberg in
the Imperial
taxation.

The only remaining item under the heading of revenue is that of the share in the imperial customs duties, and tobacco, spirit, and stamp duties. This is estimated at a sum of 11,984,530

marks for the current year, the estimate for last year was 6,482,670 marks, the estimated increase for this year is, therefore, 5,501,860 marks. This share in imperial taxation is divided into three principal heads.

The first of these is customs and tobacco duties, under which heading the share of Wurtemberg, calculated according to its population, is estimated to amount in 1889-90 to 6,423,290 marks, being 798,370 marks more than its estimated share for 1888-89, which was 5,624,920 marks. This increase is probably in some measure due to the increase in the duty on imported tobacco. Customs and tobacco.

The second heading is the tax on spirits. This is the first year in which this tax has figured in the imperial budget, the estimate is, therefore, necessarily an uncertain one. The imperial estimate of this tax is 110,632,000 marks. If this estimate be realised, Wurtemberg's share in it would amount to a sum of 4,711,270 marks. Spirits.

The third heading is the imperial stamp tax. It is estimated that Wurtemberg's share under this head will amount, in the year 1889-90, to 849,970 marks, showing a small falling-off of 7,780 marks from the estimate of last year, which was 857,750 marks. Stamp duties.

It will thus be apparent that the large increase of 5,501,860 marks, in Wurtemberg's estimated share of the produce of the imperial taxes, is in a great measure due to the estimated revenue to be derived from the new imperial tax on spirits. Whether there is a reasonable probability of this estimate being realised or not it is impossible for me to say, an opinion on this subject could only be arrived at after a careful study of the German imperial budget, which does not come within the scope of this paper.

The following table shows at a glance the four principal heads of revenue of Wurtemberg, with the amount which it is estimated will be yielded under each head in the year 1889-90:— Four principal heads of revenue.

	Marks.
Revenues from the Crown properties (Kammergut)	23,958,359
Yield of direct taxes	12,253,330
Yield of indirect taxes	12,988,000
Share in the Imperial Revenue	11,984,530
Total Revenue	61,184,219

Putting aside for a moment the share in the imperial revenue which, as will appear later, is almost wholly absorbed by the matricular contributions, required to cover the expense of imperial objects, such as the army, navy, imperial civil service, &c., it results that the actual revenue of the kingdom of Wurtemberg for the purposes of local—as distinguished from imperial—government is estimated to amount this year to 61,184,219 marks, less 11,984,530 marks, or 49,199,689 marks, in round figures 49,200,000 marks. Of this sum, nearly 24,000,000 marks is yielded by the Kammergut or ordinary revenues of the state, leaving only a little more than half the expenses of government, *i.e.*, about 25,200,000 marks to be raised by taxation. This amount spread over a population of nearly 2,000,000 (1,995,185 according to the Revenue for local purposes, 49,200,000 marks.

census of 1885) shows a sum of about $12\frac{1}{2}$ marks of taxation per head. The imperial taxes come in round numbers to a further sum of 12,000,000 marks, or about six marks per head of population. The total amount of taxation per head would therefore appear to be $18\frac{1}{2}$ marks, to this sum must, however, be added the expenses of the collection of the taxes; these expenses do not appear in most cases to be large, but it would be difficult, if not impossible, owing to the form in which the Wurtemberg budget is framed, to arrive at the exact figure of these expenses. I think it may, however, be safely stated that the amount paid in taxes per head by the population of Wurtemberg is not large compared to the amount paid by the populations of some other European countries. The gross amount probably does not much exceed 20 marks or about 1*l.* per head. To this royal and imperial taxation must be added the local or municipal taxes. This is a subject which has been more than once inquired into, but unfortunately without any very reliable result. Sir H. Barron stated in a report written by him in 1886, that probably these local rates at that time did not exceed 14 marks per head, but there has certainly been an increase since that date. It may, however, be safely stated that, at the present moment, the total amount under all heads paid in taxes by the population of Wurtemberg does not exceed 2*l.* per head.

Estimated ex-
penditure.

I now turn to the estimated expenditure of the kingdom of Wurtemberg for the year 1889-90. This amounts to a total of 58,123,439 marks, as against 58,634,237 last year, being a diminution of 510,798 marks. The following are the chief items:—

Heads of Expenditure.	Estimates 1888-89.	Estimates 1889-90.
	Marks.	Marks.
Civil List	1,804,658	1,796,200
Apanages and Jointures	279,332	266,744
National Debt	19,994,385	20,330,657
Annuities	461,159	462,132
Compensations	106,667	64,485
Pensions (civil, military, and clerical)	2,161,000	2,245,833
Quiescent salaries	6,897	5,697
Gratuities	377,680	396,032
Privy Council.. .. .	61,050	59,850
Court of Administrative Justice (Verwaltungs- gerichtshof)	24,450	24,050
Ministry of Justice	3,863,711	3,865,529
" Foreign Affairs	186,291	189,876
" Interior	5,815,542	5,824,090
" Churches and Schools	8,170,297	8,413,870
" Finance	2,812,982	2,927,191
Legislative Chambers	349,987	353,050
Reserve Fund.. .. .	70,000	100,000
Matricular contributions to the Imperial Govern- ment	11,740,339	10,448,153
Postage	320,000	350,000
Improvement of Salaries	27,800	..
Total Expenditure.. .. .	58,634,237	58,123,439

As is shown in the above table the estimated expenditure for this year is 58,123,439 marks, as against 58,634,237 marks in last year's estimates, being a diminution in the current year of 510,798 marks. This diminution is entirely due to the reduced estimate of the matricular contributions for the current year. The following table shows more accurately the real amount estimated to be required for the government of the kingdom of Wurtemberg:—

	1888-89.	1889-90.
	Marks.	Marks.
Total Expenditure	58,634,237	58,123,439
Deduct Matricular contributions .. .	11,740,339	10,448,153
Local or Royal Expenditure., .. .	46,893,898	47,675,286

From this it is apparent that the actual local expenses of government are estimated to amount in the present year to 47,675,286 marks, which compared to last year's estimate of 46,893,898 marks, gives an increase for this year of 781,388 marks. Increase in the local expenses.

I proceed to examine the various heads under which expenditure will be incurred in the current year.

The first of these is the Civil List, which is set down at a figure of 1,796,200 marks this year, against 1,804,658 marks in last year's estimates, showing a reduction of 8,458 marks. Civil List. The King's Civil List consists of a sum of money fixed by law in 1874 at 1,600,000 marks yearly, and also a certain quantity of wood for firing, barley, rye, oats, &c. If the whole amount of such allowances in kind is not consumed in the year, the balance is handed to the King in cash at the end of the year, at the average price of the articles during that year. Owing to the low price of rye, barley, and wood at present, the cost of these allowances is expected this year not to exceed 196,200 marks, being 8,458 marks less than last year.

The next item is that of allowances and jointures of the different members of the Royal family. These amount this year to 266,744 marks, against 279,332 marks last year, being a diminution of 12,958 marks. This diminution is partly due to the reduced price of wood, and partly to the fact that the death of H.R.H. Prince William Maximilian caused his allowance to cease, though at the same time the allowances of some of the members of the Royal family have been increased. These allowances are generally paid partly in money and partly in kind, like the King's. Allowances and jointures.

The service of the National Debt is estimated to require 20,330,657 marks this year, being an increase of 336,272 marks on the amount allowed for the past year (19,994,385 marks). National Debt. I regret that the shortness of the time at my disposal renders it impossible for me to examine this heading in any detail, the following are the principal items of expenditure under this head:—

	Estimates 1888-89.	Estimates 1889-90.
	Marks.	Marks.
Interest	17,359,518	17,574,836
Sinking fund	2,618,367	2,789,721
Expenses of redemption of bonds and coupons..	16,500	16,100
Total	19,994,385	20,380,657

Capital of the National Debt on April 1, 1889. The capital of the National Debt on April 1, 1889, amounted to 433,471,326 marks, made up as follows:—

	Marks.
Railway debt	390,643,823
General debt	42,827,503
Total	433,471,326
To this must be added a new $3\frac{1}{2}$ per cent. railway loan of ..	7,000,000
	440,471,326

Increase in the capital of the debt.

This loan was to be raised on or about April 1, 1889. The real capital of the Debt for which provision has, therefore, to be made in the estimates for the year 1889-90 is 440,471,326 marks, or about 22,000,000*l.*, of which sum only a little more than 2,000,000*l.* is general debt, the railway debt being accountable for nearly 20,000,000*l.*

The question as to whether the net revenue derived from the railways covers the interest on the railway debt, is a very intricate one. The general result, however, of investigations under this head appears to be that there is a small annual deficit, but as certain allowances have to be made for postal and telegraphic work done on the railways, it is practically almost impossible to state with accuracy the amount of the deficiency under this head.

The increase in the capital of the National Debt sufficiently explains the increase of 336,272 marks in the amount set down in the budget for its service this year, as compared with last year.

Annuities.

Under the next heading of annuities, a sum of 462,132 marks will be required this year, being 973 marks more than the estimate for last year, which was 461,159 marks. This is due to a slight increase in the annuities payable in respect of the salt works at Hall. Almost the half of the sum set aside for annuities, viz., 220,643 marks, is required for the redemption of the Wurtemberg paper money, which was withdrawn from circulation in 1874. This charge was portioned over a period of 15 years, consequently the payment in this year's estimates is the last but one, and after the last payment, which is due on January 1, 1891, this charge will cease.

Compensations.

The next head is compensations, which are estimated to amount to 64,485 marks in 1889-90, against 106,677 marks in 1888-89, being a diminution of 42,192 marks. The various items under this head are all small, and of no very great importance or interest, the whole sum only amounts to a little more than 3,000*l.*

Pensions this year are expected to absorb a sum of 2,245,833 marks, being an increase of 84,833 marks on last year's estimates of 2,161,000 marks. These pensions are almost entirely civil and clerical, a small sum only of 23,000 marks being provided for military pensions this year, being 10,000 marks less than the sum provided for the same object last year. The increase in this year's estimates is, therefore, entirely on account of pensions expected to become due to police, schoolmasters, catholic and evangelical ministers of religion, and the widows and orphans of the above. The charge under the head of pensions is not a very large one, and does not appear to call for any special remarks. Pensions.

The next charge for quiescent salaries is a very small one, being only 5,697 marks this year, as against 6,897 marks last year. The diminution of 1,200 marks is owing to there being only four persons instead of five drawing the salaries this year. All the recipients are over 60 years of age. These salaries are not exactly pensions, but seem to bear some resemblance to the system of "half-pay" in the English army. Quiescent salaries.

The next head of gratuities is estimated for 1889-90 at 396,032 marks, being an increase of 18,352 marks on the estimate of 1888-89, viz., 377,680 marks. These gratuities are granted to poor civil servants and others who are not entitled to pensions, or whose pensions are very inadequate, and in some cases to their widows and orphans. There is also included under this head a small charge for certain soldiers who were wounded or invalided in the war of 1870. Gratuities.

The Privy Council this year will require 59,850 marks, against 61,050 marks last year. This slight diminution of 1,200 marks is apparently due to a change in the staff of the office; the salaries of the clerks will within a year or two again return to the figure of last year. Privy Council.

The Court of Administrative Justice is estimated to require 24,050 marks this year, being 400 marks less than the estimate for last year. Administrative Justice.

The ministry of justice, with an estimate of 3,865,529 marks for this year, shows only a small increase of 1,818 marks on last year's estimate of 3,863,711 marks. This increase appears to be due to the usual increment of salaries. Ministry of Justice.

The ministry of foreign affairs is estimated to require 189,876 marks this year, against 186,291 marks last year, being an increase for the current year of 3,585 marks. Of the whole sum, about half, viz., 98,860 marks, is on account of the salaries and expenses of the ministers at the four legations belonging to Wurtemberg, at Berlin, Petersburg, Vienna, and Munich. Ministry of Foreign Affairs.

The expenses of the ministry of the interior are expected to amount in 1889-90 to 5,824,090 marks, against an estimate of 5,815,542 marks for 1888-89, being an increase of 8,548 marks in the estimates for the current year. This is due to a small increase in the strength of the police force. Ministry of Interior.

The ministry of churches and schools is estimated to require 8,413,870 marks this year, being an increase of 243,573 marks on Ministry of Churches and Schools.

last year's estimate of 8,170,297 marks. This increase, which is not large, will be mostly expended on the salaries of ministers of religion and schoolmasters.

Finance department.

The Finance Department estimates its requirements for the year 1889-90 at 2,927,191 marks, which compared with last year's estimate of 2,812,982 marks shows an increase of 114,209 marks. This increase is to be spent upon new buildings and upon repairs to old ones.

Legislative Chambers.

The Legislative Chambers are estimated to require 353,050 marks this year, being 3,063 marks more than last year's estimate of 349,987 marks.

Reserve fund.

A sum of 100,000 marks is set down as a reserve fund, this is 30,000 marks more than was set down in the estimates for the previous year, viz., 70,000 marks. This fund is destined to cover unforeseen expenditure of a general kind in the various departments.

Matricular contributions to the German Empire.

The matricular contributions for imperial purposes are set down at the figure of 10,448,153 marks this year, as against 11,740,339 marks last year, being a decrease of 1,292,186 marks in this year's estimates. This item is naturally not under the control of the Government of Wurtemberg, and is only very lightly touched upon in their estimates. According to the imperial estimates, this will be Wurtemberg's share of the expenses of the Imperial Government; it appears probable, however, that this estimate will be exceeded during the present year.

Postage in lieu of franks

The last item in the expenditure account is the charge for postage. This is estimated to amount to 350,000 marks in 1889-90, against an estimate of 320,000 marks for 1888-89. As the actual cost of postage in 1887-88, the last year of which the accounts are made up, was 351,000 marks, it would appear that the estimate for 1888-89 was too low, and that the estimate for the current year is more likely to be correct.

This charge for postage is made in consequence of the system of franking official correspondence in the Government departments having been abolished.

Estimates will probably be realised.

The general impression produced by a study of this budget is undoubtedly a good one. The estimates both of receipts and of expenditure appear to have been framed with considerable care, and, having regard to the actual results of the previous years, they may, I think, in most cases, be fairly expected to be realised. If this expectation be not disappointed, there will be a surplus of 3,060,780 marks, or about 150,000*l.* at the end of the financial year; this compares most favourably with the estimated deficit of about 1,800*l.* in last year's budget, to which I have already referred.

The army not provided for, as it forms part of the Imperial forces.

The fact that no mention whatever is made of the army in the above budget appears odd at first sight, it is, however, explained by the fact that the army of Wurtemberg now forms one Corps d'Armée in the German imperial army, and although its officers are appointed and commissioned by the King of Wurtemberg, the whole expense of the army is thrown upon the imperial funds, and

may be said to be included in Wurtemberg's share of the matricular contribution.

The National Debt of Wurtemberg, amounting to about 22,000,000*l.*, cannot be considered a large one, having regard to its composition and to the population of the country. As I have pointed out above, the General Debt amounts only to about 2,000,000*l.*, or 1*l.* per head of population, the remaining 20,000,000*l.*, or 10*l.* per head having been incurred in the construction or purchase of railways. At the present moment almost the whole of the railways in the kingdom of Wurtemberg are the property of the nation. Although it is probably a fact that the net receipts from the railways are not sufficient to pay the whole charge on account of the portion of the Debt incurred for the railways, yet, in any case, the deficit which has to be made up from other sources is very small. The annual charge for the whole Debt amounts to only 20,330,657 marks, or 1,000,000*l.*, being 10*s.* per head of population. Against this must be set off the estimated net receipts from the railways, amounting in the current year to 15,180,400 marks, or about 750,000*l.*, that is to say, three-quarters of the annual charge for the whole Debt. The actual burden, therefore, of the National Debt on the population of Wurtemberg is 2*s.* 6*d.* per head per annum.

It is true that the capital of the Debt has increased of late years, and is still continuing to do so; but the amount of this increase is small, and has been entirely expended upon a remunerative object, viz., the railways; it can, therefore, scarcely be regarded as otherwise than beneficial.

Since the publication of the above budget, a small, extraordinary budget has also been prepared. It provides mainly for improvements in salaries and pensions, and the building of new schools, &c. It is difficult to say exactly what sum it is proposed to spend on these objects in the current year; the general result, however, appears to be that the estimated surplus of 3,060,780 marks (150,000*l.*) will be utilised for the above purposes.

I am, &c.

(Signed) VAUX OF HARROWDEN.

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GERMANY.

REPORT FOR THE YEARS 1887-88-89
ON THE
TRADE OF BAVARIA.

*Presented to both Houses of Parliament by Command of Her Majesty,
AUGUST, 1890.*

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GERMANY.

MUNICH.

Mr. Drummond to the Marquis of Salisbury.

My Lord,

Munich, July 8, 1890.

I HAVE the honour to transmit, herewith enclosed, a Report on Bavarian Commerce, drawn up by Mr. Helyar, Second Secretary to Her Majesty's Legation.

It is of much interest, dating from 1887 to the end of last year, and besides showing the state of each particular trade, enters fully into the condition of the labour market, as well as proves the beneficial effect of the accident and fire insurance laws, and the bad effect on trade caused by hostile tariffs and any uncertainty in the political horizon, as is shown by depressed trade in 1887 and its gradual increase since 1888, owing since then to a feeling of security in peace.

I have, &c.

(Signed) VICTOR DRUMMOND.

Report on the Commerce of Bavaria.

In 1887 Bavarian commerce was in a depressed state, owing to the troubled condition of the political horizon and the influence of hostile tariffs, but the outlook was already slightly improving.

The eight provinces reported as follows:—

Oberbayern.—In spite of the injurious effect of the gloomy political outlook, the course of trade throughout the year was not unfavourable. Improvement in wholesale trade and enlarged markets did not bring with them corresponding profits. Trade being driven inwards by foreign tariffs produced sharper internal competition, and tended to reduce home prices. On the whole, prices were stationary or slightly declining. The retail trade reported not unsatisfactorily. In particular all trades allied to building were favourably influenced by building activity, and especially in Munich. On the other hand, all trades complained of excessive competition. Artisans had little ground for complaint, however, as their wages showed a tendency to rise.

Niederbayern.—Taking all things into consideration, the year was not unfavourable. After much over-speculation trade seemed to be settling on a sounder basis. In the match trade complaints were rife of the price of raw materials, and of the higher Austrian import duty. Similar complaints were made by the sawing mills, and the glass-works report poor sales and much foreign competition. The paper trade was declining. Earthenware and china trades, stone quarries, machinery manufacture, brewing, powder and vitriol manufacture, &c., were in a more favourable state. Building was very active, and the outlook good. The construction of the Danube railway bridge, and of a large locomotive factory at Passau, contributed thereto.

Mittelfranken.—No actual change or improvement took place during the year. Special branches may have improved, but even these were quite exceptional, or else lower prices destroyed the benefit of an increased trade. The unsatisfactory state of foreign markets pointed to the danger of a further fall. The commercial relations of the country with its foreign neighbours, *e.g.*, Austria, were unsatisfactory. Connected therewith stood the numerous complaints of the injury done by the rise in foreign tariffs, from makers of paper, gold and silver plate, lead pencil, bronze paints, hardware, toys and tin figures, and hop growers. The tariff war between certain foreign countries depressed German trade in general. The prices of manufactured goods in the home market were very low, while, on the other side, the price of raw material (metals) rose nearly cent. per cent., to the detriment of the manufacturer. Technical instruction for the improvement of the workpeople and of the finished product was much required.

Oberfranken.—The year was not, on the whole, unfavourable. The staple industries, spinning, weaving, brewing, granite working, tile-making, and building were active, though profits were limited in consequence of over-production, foreign competition, and tariff restrictions. Several spinning and brewing firms enlarged their works, and several new businesses were established. The basket and china industries suffered heavily from foreign tariffs, and the basket export to France and Austria almost ceased.

Unterfranken.—Trade was stationary, and only improved in a few cases. The dread of general war and hostile tariffs weighed upon commerce. The usual complaints of increased competition and declining markets and profits were repeated, as in former years.

Oberpfalz.—The general state of trade was unsatisfactory. Only a few new firms were established, while many unfortunately had to give up business, amongst others the only sugar factory in the province. The state of the retail trade was particularly bad, and the long and unequal struggle of the small producers against the low prices of machine-made products in most cases could only end in ruin. Labour-saving machinery, such as small gas-engines, was introduced advantageously.

The Danube traffic improved greatly, and the new warehouses in Ratisbon were insufficient for the enlarged traffic. The almost prohibitive Austrian tariff acted very injuriously on the important manufacture of mineral pigments. Rough glass manufacture also suffered.

Pfalz.—The general condition of manufacturing industry was unaltered. The amount of labour employed slightly increased. The railways reported favourably, and for the first time showed a real surplus after covering debenture, interest, sinking fund, and all other charges. The timber trade slightly fell off. Coal-mining extended about 20 per cent. Building was very active, and in connection therewith the output of the stone quarries rose 75 per cent. Any tendency to improvement in general trade, however, was neutralised by higher foreign tariffs and the gloomy political outlook.

Schwaben.—The general trade was stationary. Retail trade showed some improvement. The following branches were on the whole fairly prosperous; the manufactures of paper, textiles, matches, iron and machinery. The timber trade was in a very bad condition.

1888.

The reports generally stated a considerable improvement in business on the year before. In Mittelfranken and Unterfranken, however, business was unprogressive, although no actual decline took place. The factory inspectors state that production was in a satisfactory condition. In the cotton factories of Schwaben complaints were made of poor profits, consequent on keen competition and increase of production. In Oberpfalz, the corn and grain millers complained of unfavourable tariff rates, and competition from North Germany. In Mittelfranken, the gold thread manufacture declined in 1887, and still more in 1888. On the other hand, gold brocade weaving, &c., improved. The ivory and horn comb manufacture also declined through over-production, and the same may be said of the metal-leaf and bronze paint industries. Complaints from the same cause were made in Oberfranken in the linen weaving factories, the demand for the product showing a decline. The manufactured wool and cotton velvet makers report unfavourably. In the small factories in Schwaben improvement and increase of business took place. Building, too, increased, and all the building trades were full of work and of orders for the following winter. These conditions reacted favourably on the other trades. However, taking the year as a whole business distinctly improved, and was better than it had been for four or five years. Throughout Bavaria the improvement in the building trade was very marked. The small workshops in Augsburg particularly complained of the crushing competition of the great factories, and also of the injury done them by commercial touts and pedlars. In Oberpfalz manufacture was in a favourable position; solvency increased, and in the manufacture of decorative art furniture especially. In Unterfranken the small factories report unfavourably, owing to

altered trade conditions and great competition. Almost all small manufacturers are compelled to purchase from the larger factories on account of their low prices, and to resell, thereby diminishing their own production, or else to purchase some component parts of their manufactures from the large factories, and only themselves produce the remainder. The general state of business being taken as favourable, it must be admitted that keen competition from abroad has reduced the net gains of the producer to a very small sum. Art industries, particularly decorative furniture and metal wares, were in a better state.

OBERBAYERN.

In 1888, as previously, the combination of individuals for commercial enterprise has been often beneficial. In other cases, however, *e.g.*, the French copper "ring," it has done great harm. In the money market also there has been more signs of artificial than natural activity. The continuance of peace and natural increase of business have produced accumulation of money with its necessary consequence, the rise in the value of commercial paper and the fall in the rate of interest. Capitalists were not satisfied with these rates, and sought new and more profitable outlets, whereby many companies were formed, chiefly, however, combinations and extensions of existing private undertakings. The public took up the shares of these undertakings eagerly, however high the price of issue, not distinguishing between good and bad. The movement could not of course be permanent, the only question being the greater or less amount of injury done before business returned to its natural channels.

SCHWABEN.

Here, also, many sound undertakings were founded, through inheritance, necessity of introducing new capital, and of contending with foreign competition; but in many other cases enterprises have fallen too much into the hands of small and weak capitalists unable to bear up against the inevitable misfortunes of bad years, &c.

NIEDERBAYERN.

Large companies were formed through the necessity of combination to diminish and divide risks in view of the increased activity and sphere of operation of enterprises, and to cope with the enormously increased foreign competition, and further, to meet the demands of modern trade on capital and organisation, which only the very best businesses are able to do isolated. Consequently the solvency of enterprises being increased, and risk being divided between shareholders, there was no special fear of injury accruing to business, care being taken by the proper authorities not to allow the formation of unsound companies.

Mills.

From the majority of provinces the reports were favourable. In Unterfranken they were only relatively favourable, and were actually unfavourable in Pfalz and Oberpfalz alone. Complaints

were general throughout Bavaria, and especially in Oberpfalz, respecting special railway rates for flour, and North German competition. Substitutes for flour, *e.g.*, so-called "castor" flour, and inferior wheat and bean flour, and rye flour, enable the North Germans to compete successfully with Bavarian grain, and native products suffer. The permission to import free three kilos. of flour leads to much abuse on the Austro-Bavarian frontier.

No great change in the state of trade took place. Ober- Colonial ware bayern will serve as a type of the other provinces. There was a and groceries. certain improvement in sales, attributable in great part to a favourable winter and to the exhibitions. The net gains, however, fell off, and the situation changed for the worse in the space of a year. Especially in groceries a sweeping reduction of prices took place, partly owing to new competition, partly to the want of system of the old established firms. Sugar, petroleum, &c., which formerly yielded little profit, now yield none. This is more and more the case every year, and the retail trade has to contend with increasing difficulties. From Mittelfranken no improvement of trade is reported. The agricultural population, who are the chief consumers, show no increase of means, except in certain special hop districts. In the larger towns, increase of population has brought with it an increase of consumption. The trade however has been injured, and prices unnaturally depressed, by ill-advised retail enterprises on the part of persons without capital or knowledge of business.

Complaints were general throughout Bavaria of bad business, Spirits. owing to depression of selling prices. In Munich, early in 1888, wholesale prices were exceedingly low, *i.e.*, 42 marks per 100 liters. They were slightly higher in North Germany, rendering a profitable export possible. However, after the bad harvests in the summer, a rise in prices took place, and in November they reached 55 marks. In North Germany the rise was much slower and stopped sooner, consequently Bavarian prices had to sink to the same level, at the close of the year many factories were working at a loss to procure fodder for their cattle. The general condition of the spirit producers was very poor, and the prospect bad, through very low prices. In Oberpfalz the activity of trade in the early months was followed by a great falling-off in the autumn and winter. Attempts to export raw unrefined spirits at a profit to North Germany, led to such a rise of price thereof at home as to ruin the trade of the refiners.

The general reports were those of a continuous decline. Un- Wine trade. doubtedly the competition of beer had a great deal to do with this. Bad vintages of late years also contributed, and the wine trade proper suffered from the competition of grocers and various retail shops who sell common wines under sounding names, &c. From Franconia and Pfalz some improvement of trade was hoped for, owing to the better vintages of recent years.

The demand continued steady, and better qualities were in Margarine. demand. Raw material rose in price, and manufactured margarine consequently rose also.

Bakeries. No change took place since the previous year. The same complaints as usual were made of the undue profits of the middleman. The price of flour rose: *e.g.*, wheat flour rose 2*s.* per 220 lbs.; rye flour, 5*s.* to 6*s.* per 220 lbs. The quality fell off. The high flour import tax made itself felt. Firewood, milk, &c., used by bakers, also rose in price.

Butcher trade. Business much improved. Some 70,000 more beasts were killed than in 1887. The quality was only an average. The prohibition of the import of cattle, &c., from Austria made itself increasingly felt. The import from North Germany continued, but of inferior quality. The following table shows the number of beasts of all kinds killed in the year:—

Oxen	23,344
Cows	17,766
Bulls	7,181
Bullocks	7,789
Calves	207,151
Swine	144,781
Sheep and goats	28,171
Lambs and kids	53,000
Young pigs	20,000
Total	509,183

PFALZ.

Leather manufacture and trade. The state of business was unsatisfactory. Sole leather fell in price through over-production, and the cheapest of raw material did not suffice to compensate for this. Wash-leather manufacture increased, chiefly at Pirmaseus. The demand for leather in the shoe trade also increased. Crown leather (for machine beltings, &c.) improved in demand in Oberbayern. The price of raw hides continued low throughout Bavaria, but the price of prepared leather still lower in proportion. There was much over-production of calf leather.

Skins and hides. Trade was very bad, almost the worst for 20 years; in fact the state of business was as bad as possible, without prospect of improvement, except in the following branches where demand was good: sheep and lambs' skins for glacé leather, and kids' skins.

Boot and shoe trade. The state of business was very chequered. Complaints continued of undue competition from Houses of Correction, military workshops, pedlars, &c. Efforts were being made to improve business by means of technical schools, &c.

Wax trade. From Unterfranken no special change was reported. The price of raw wax was higher during the import season than in the following spring, which was favourable to business. The German production of wax, chiefly in Hanover and Holstein, was unequal to the demand. Nevertheless there did not appear sufficient ground for the rise in the import duty from 8*s.* to 15*s.* per 220 lbs., which was equivalent to a rise of 87 per cent. The price, however, of foreign wax did not rise in consequence. Very extensive frauds in wax imported from Africa took place, and were only discoverable in the bleaching process. Great caution was necessary with African wax, and some cheap kinds became

almost unsaleable. In Oberbayern, and especially Munich, business was much better, largely owing to the exhibitions of the year. The export trade also improved, especially in the finer sorts. The price of raw material continued low till near the close of the year, and as the demand for the finer sorts of white wax increased business was much encouraged. The rivalry of the pedlars declined, as country customers had discovered the poor quality of their wares.

The course of the wool trade was normal in Munich. In Unterfranken and Schwaben business was bad. In Oberfranken the cotton industry showed some variability:—In January $5\frac{3}{4}d.$ was quoted for middling cotton, which fell in April to $5\frac{3}{8}d.$ through increased stocks, but rose again later. In the summer stock in Liverpool diminished, and prices rose to $6d.$ in September, the highest point. The large autumn cotton supply brought prices down, until in December they again touched $5\frac{3}{4}d.$ In woollen yarn and cloth there was a continuous decline till the end of the year. Through over-production the state of cotton weaving was very bad. The last decade was the worst on record, and the year 1888 was the worst of the decade, the price of cotton yarn being 9 per cent. higher, while the selling price of cotton stuffs was lower than ever. In coloured stuffs business was better, the improved sales more than compensating for the rise in price of raw material. The spinning business also improved.

The building trade was active throughout the year, which reacted favourably on all the allied trades, and produced full work and satisfactory profits. In Munich especially the activity was very great, and even surpassed the year 1876. Building speculation was largely entered on by many who were dissatisfied with safe investments at low rates of interest. Builders mortgaged their building plots in order to undertake fresh buildings and so forth, a great edifice of credit being piled up on not very solid foundations. The year 1889 commenced consequently with great building activity, and the culminating point has not yet been reached. The natural increase of Munich does not necessitate such extensive building operations, and a climax must soon be reached, followed by a decline.

Business in 1888 was good beyond expectation, principally owing to the improvement in the iron market, and in connection therewith the continued activity in the blast furnaces. The coal and peat trade continued active and good. In Oberpfalz the prices of various sorts of manufactured iron rose in price. The prices of coke and manufactured pig-iron also rose 20 to 30 per cent. Railway iron showed less favourably, owing to foreign competition. The other provinces send similar reports.

OBERBAYERN.

The locomotive manufacture gave, on the whole, satisfactory results, orders being more plentiful, while at the end of the year many orders were in hand for 1889. Raw material and labour rose in price.

In Wool trade and woollen manufacture, cotton spinning and weaving.

Stone, building materials, and earthenware, for cement, asphalt, bricks, earthenware, &c.

Mining industries.

Chemicals.

Over-production of several articles brought down prices: *e.g.*, soda, ammonia, sulphuric acid, borax, paraffin, &c. Antimony, white lead, and many other articles dependent on the metal market, remained stationary until near the close of the year, when a powerful movement in that market forced up prices.

OBERPFALZ.

The manufacture of pigments was in a precarious state, principally owing to the Austrian customs tariff which subjected earthy pigments to a duty of 1 gulden (1*s.* 10*d.*) per 220 lbs. To the loss of Austrian markets was added the danger of competition, raw material being exported duty free from Oberpfalz, and the manufactured pigment being re-imported from Austria.

Glue.

Business was stationary, and in some provinces even declined, owing to the higher Austrian duty on glue. Another unfavourable circumstance was that the Russian duty on glue has been high for some years past.

Textile and
clothing
industry.

Reports agree that for manufactured woollens 1888 was a normal year. The price of manufactured cottons, woollens, and half woollens continued firm, and even rose a little. From Pfalz was reported that greater activity reigned; there was a demand for better qualities, and good middling sorts were largely sold.

The retail trade was better than in 1887. The country people did not purchase with the same penurious economy, and the improved position of the artisan reacted on business, which generally increased.

Unterfranken reports on the hardware, woollen, and linen trades were that business was fairly active, especially in lace, passementerie, and ribbons. Buttons and lace cords suffered from change of fashion. Woollen and cotton yarns suffered from a falling market. In cotton-weaving yarns a great decline took place, consequent on the decay of hand-loom weaving. Knitting and sewing cottons on the contrary rose steadily, but the increase of advertising and low prices, and the inferior quality consequent thereon injured sound business, and the stoppage of English competition through a higher tariff was not sufficient to counterbalance this.

OBERBAYERN.

Silks and
millinery in
unich.

A change of fashion brought whole-silk articles into use, while articles partly silk and partly velvet plush have gone out of fashion. Orders for whole silks have, therefore, largely increased. Makers of velvet and plush articles find little business, and what there is at very low rates. The large number of looms set up in more favourable times can only find work if fashion changes. A sign of the times was a rise in the raw material of silk at the close of 1888 of 20 to 30 per cent.

In the tailoring trade only a partial improvement took place.

Great activity reigned in the making of ladies' mantles and corsets.

The rag business has been declining for many years, and especially that in better sorts of rags (white linen, cotton, and rough rags) was very bad. The great competition in the paper manufacture is the cause, and forced makers to employ a certain amount of various substitutes with their rags, thereby further lowering the price of the latter. Many rag dealers and collectors who formerly made a living in the trade threw up the business. In the paper manufacture proper, factories were in full work, but the price of paper again fell, while that of chemicals rose. The continuous increase of production stood in the way of an improvement in trade. From Unterfranken is reported that only those paper-works showed an improvement where, by judicious employment of cellulose, large economies in fuel and chemicals were possible.

In the early part of the year the market was somewhat depressed, but later the two large exhibitions much improved trade. There was activity in Christmas productions. The publishing trade also was good. Art manufacture in Munich, encouraged by the exhibition, was flourishing, and the book trade in general improved from the same cause and from the centenary. Under-bidding was less prevalent.

The year was, on an average, a good one. Prices rose till the close of the year, and trade improved. This was due to activity in the building trade throughout Germany, and in those trades which consume wood. Oberfranken reports a stationary trade. Some improvement in unsawn timber in the spring was followed by over-production and low prices in the summer and autumn. Till November Aschaffenburg was crowded with timber.

In the sawing trade the best building timber and planks were in demand. Inferior sorts sold at very low rates. Want of water-power and small stocks of unsawn timber produced a higher demand for all sorts of planks, and the demand could hardly be covered. From the Fichtelgebirge a good demand was reported for all kinds of timber, and sawing works were in full swing. From Hof was reported that long balks and planks were much exported to North Germany, while the making of cellulose assumed great proportions. As young trees are used for this purpose, the destruction of the forests is anxiously feared. From Unterfranken the export of unsawn oak to the lower Rhine and Holland was very small owing to foreign competition. Good sawn oak was in much request, owing to building activity in Frankfort and down the Rhine, but prices hardly rose. In pine and fir the demand was good throughout the year, and prices rose 10 per cent., but entirely to the profit of the owners of forests who had discounted the rise. The new weirs and sluices below Frankfort are a hindrance to the trade. Mittelfranken reports that trade in planks increased largely, but profits declined, owing to the selling price not having risen as much as the purchasing price. Many producers also sold direct to consumers, although they gained

Paper manu-
facture and
raw materials.
Book trade
and art manu-
factures
(paper).

Book trade.

Wood and
wood
products.

nothing thereby. Franconian wood for crockery, crates, &c., was in demand, and 6 per cent. cheaper than Hungarian ditto, but the latter found a still better sale, being of superior quality. The Munich report stated that building activity in all German cities in 1888 produced a good timber sale at enhanced prices. In the State Forest's timber sales there was lively competition, including firms from the Neckar and Rhine, so that prices were 30 per cent. above the regular forest rates. Saw mills were in full work throughout the year, and much timber for building had perforce to be sawn elsewhere. Sawed timber was mainly exported to the Rhine country and Westphalia, while a small part went to Holland, Belgium, and Italy. Large quantities of unsawn timber went by rail to the Main and Rhine countries, as also through Heilbrunn down the Main to the Rhine. Prices were good both in spring and autumn, while in summer they declined through over-production.

Parquetry
trade.

A good trade was done owing to building activity. Competition was very active, however, and forced down prices, although raw materials rose 10 to 15 per cent. In west Germany the import of cheap Swedish and Russian woods was very injurious to our trade. It is curious that many employ American pitch-pine for floors, although barely cheaper than native oak, and certainly not cheaper than beech, while in quality it cannot compare with native hard wood, and the pitch in the pine tends to ooze out. The inclusion of the Hans cities in the Zollverein has thrown them open to our export trade, whereas previously they were supplied from abroad. In exporting to England it is difficult to compete with Austrian rivalry, Austria possessing not only the cheap sea route from Trieste at her command, but also the Elbe-Hamburg route with very cheap rates.

Various
branches of
trade.

Art industry in Munich showed improvement, attributable to the German Art Industrial Exhibition. Future orders were numerous, especially in furniture and in superior locksmith's wares, &c. The system of manufacture has been improved, thereby rendering cheaper prices possible.

Electrical
lighting,
power, &c.

The use of dynamo-electrical machines increases rapidly. The breakdown of the copper ring brought down the price of copper to a normal rate. The electric light came more and more into use, and many towns have decided to employ it on the termination of their gas contracts. Great improvements have been made in electrical machinery and prices reduced. They will be still further reduced if the price of copper has a further fall. Business on the whole was good, but wages were unaltered. In machines of precision electrical science has immensely developed. Formerly such work was best carried out in Paris, though largely by German workmen; but now all this is changed, and in Munich technical and scientific apparatus is very largely constructed of unsurpassed excellence.

Bavarian
Factories
Inspector's
report.

A satisfactory account was given of the state of Bavarian industry. A considerable increase in new enterprises took place, and the number of businesses abandoned was small. The number

of workers employed increased, and largely in the case of women and children, owing to the development of machinery, and wages rose generally. Wherever complaints as to wages were made, competition was the cause. Only in a few cases was it found that persons were employed under the legal limit of age. It is satisfactory to note that the friendly associations against accidents, sickness, &c., fully achieved their object.

In Schwaben the number of factory workmen increased by 700, or 15 per cent., 500 of these being employed in 21 new factories. In spite of the decline of some small factories the general outlook was satisfactory, and the condition of the work men improved, through their being better cared for.

The reports from Oberpfalz and Niederbayern were satisfactory. The mirror and earthenware manufactories, and the circular tile and brick kilns all did a particularly good business. Prices in the iron trade rose, also in machinery; but the foreign competition in agricultural machines was overwhelming. The milling industry was good in Niederbayern, but unsatisfactory in Oberpfalz.

Mittel- and Oberfranken reported favourably, and there was a considerable increase in the number of factories. Wages remained stationary or slightly rose.

In Pfalz the shoe manufacture flourished, but owing to keen foreign competition prices were stationary. The export to South America somewhat declined.

The following table shows the number of new businesses of all sorts established, and of existing businesses abandoned in recent years in Bavaria:—

Year.				No. of Businesses established.	No. of Businesses abandoned.
1879	..	..	..	47,289	40,729
1880	..	..	..	46,800	39,691
1881	..	..	..	45,149	41,196
1882	..	..	..	41,902	38,954
1883	..	..	..	47,305	46,129
1884	..	..	..	46,214	35,394
1885	..	..	..	49,424	45,143
1886	..	..	..	42,505	34,703
1887	..	..	..	47,555	45,814
1888	..	..	..	44,906	37,936
1889	..	..	..	53,178	46,615

The overplus of new businesses established and above businesses abandoned in 1888 was 6,970, divided as follows :—

	Number.	Per cent.
Oberbayern	2,152	30.9
Niederbayern	531	7.6
Pfalz	1,039	14.9
Oberpfalz	270	3.9
Oberfranken	428	6.1
Mittelfranken	1,325	19.0
Unterfranken	334	4.8
Schwaben	891	12.8
Total	6,970	100.0

The division between the large towns and the rest of the country was as follows in 1888 :—

	Large Towns.	Rest of Bavaria.
New businesses established ..	16,854	28,052
Old „ abandoned ..	13,318	24,618
Overplus	3,536	3,434

The increase of business in the large towns was thus slightly larger absolutely, and very much larger relatively than in the rest of the country.

In 1888, 3,653 licences for inns and public houses were granted, and 287 brandy and spirit licences. 20,849 licences for colportage and pedling were also given.

1889.

From the Factory Inspectors' Reports for 1889 it is shown that the general state of business was satisfactory, and that prices improved. The rise in the price of raw materials, however, trenched largely upon profits. From Oberbayern and Schwaben it was reported that all open-air work has been much hindered by the rainy season, for instance, the gathering of peat. The tile and brick works were very flourishing owing to the great building activity prevailing, which activity reacted favourably on cognate trades. Extensions of enterprise in these trades have taken place so largely that, should a pause in building activity take place, commercial troubles are to be feared. All the metal trades did a good business, especially the iron trade. The manufacture of agricultural and milling machinery prospered, and the outlook was good. No improvement was noted in the match trade. The textile industries showed satisfactory results, and the outlook was good. Worst of manufacture made great progress. The linen manufacture showed in the main poor results; the number of workmen employed, however, increased by about 6 per cent. Paper

manufacture showed a considerable increase of business, but at low prices. The wood-pulp business (for making paper) extended, but is falling more and more into the hands of the paper manufacturers themselves. The indiarubber and caoutchouc manufacture was flourishing. Brewing also prospered on the whole.

From Niederbayern and Oberpfalz the Factory Inspector reported a favourable state of trade in nearly all branches of industry. Earthenware, china, and mirrors decidedly improved. Great activity reigned in the hewn stone, granite, sand, and chalk trades. The bronze manufacture, which at the beginning of the year was not flourishing, much improved towards the close. The manufacture of earthy pigments found markets in North Germany and on the Rhine, and successfully competed with French products. Austria was closed to them through high tariffs. Generally speaking wages were good, and no important change was noted.

In Mittelfranken the general state of business was satisfactory, though many complaints were made of low prices. In Nuremberg and Fürth there were bitter complaints of bad export trade in timber and metals. The export of metal-leaf and bronze paint was also stagnant.

In Oberfranken the machine looms, dye-works and finishing works showed improvement in the year, though looms here and there stood idle. There was a tendency to over-production; wages, however, were only high in the manufacture of plush and woollen articles.

The Factory Inspector's report from the Pfalz was very favourable as to hammered and rolled iron manufacture, cotton mills, and tile and brick works. The shoe trade prospered and extended itself.

The following table shows the number of new factories, and of factories abandoned with their respective totals of workpeople:—

	New Factories.	Net Increase.	Number of Work- people.	Net Increase.	Factories Aban- doned.	Number of Work- people.
Oberbayern and Schwaben ...	37	31	711	646	6	65
Oberpfalz and Niederbayern ...	32	29	810	780	3	30
Oberfranken and Mittelfranken ...	48	43	1,013	899	5	114
Unterfranken and Pfalz...	47	40	950	740	7	210
Total	164	143	3,484	3,065	21	419

The general condition of wages was good, and in some special Wages. cases wages rose. The price of necessities also rose, and, therefore, in many cases it was doubtful whether the workmen gained. In some cases the cost of living, and in others, arrears of orders, were the effective causes of the rise of wages.

Figures show that of 38,062 workpeople in the districts in- Conditions of spected, 2,622, or 6·8 per cent., were youthful, *i.e.*, from 12 to 16 labour, and years; and of the latter, 445, or 16·9 per cent., were children, *i.e.*, legal limit of from 12 to 14 years old. 230 out of the whole number of works age, &c.
inspected employed youthful labour, classified as follows:—

In 64 Factories under 5 per cent.			
In 56	"	from 5 to 10	per cent.
In 73	"	" 10	" 20 "
In 27	"	" 20	" 30 "
In 6	"	" 30	" 40 "
In 4	"	" 40	" 50 "

Tile and brickworks show more than 20 per cent. of young workpeople, having many Italians among them. Certain textile factories are in the same case. More young people were employed in country districts than in towns. In more than half of the inspected districts the proportion of young people was under 10 per cent.

A number of violations of the factory regulations was reported, viz, 187 breaches of formal regulations, 64 cases of excessive hours of work for the young, 43 ditto for children, 3 breaches of the prohibition of night work, and 4 exceptional cases. 82 of the 230 works inspected were free from any such offences. The continuous employment of Italian labour in tile and brick works is very objectionable.

Female
labour.

17,200 women are now employed in factories, as against 14,900 at the end of 1886. The following table shows how they were employed:—

	1889.	1886.
	Per cent.	Per cent.
In textile industries	71·8	73·0
In paper and leather making ..	8·1	8·0
In clothing and cleaning works ..	4·6	19·0
In polygraphic processes	3·5	
In chemical works	3·1	
In stone and earth production ..	2·1	
Miscellaneous	6·8	
Total	100	100

In textile industries, as in clothing and cleaning works, the women composed over 53 per cent. of the whole labour. In chemical works, over 39 per cent.; in the paper and leather works, over 36 per cent.; and in polygraphic processes, &c., over 24 per cent.

No marked increase in the proportion of female to male labour has taken place of late years.

Labour in
general.

1,523 works were inspected in the year, with 62,154 workpeople, against 1,432 works, and 48,804 workpeople in 1886. The increase is chiefly in stone and earth (asphalte, cement, brick, clay, &c.), works, also in textiles, in the timber trade, and in machinery construction, &c.

A labour movement has sprung up, not only in factories, but among handicraftsmen, and has made especial progress in Munich, and particularly in the textile factories, glove factories, stove works, and printing trade. Demands were made for higher wages, particularly for overtime, the abolition of piece-work, pay-

ment on holidays and saints' days, and extra payment for any work done on such days; and, lastly, the reduction of working hours. Eight hours' work was a common demand. The good relations between employer and workman were not destroyed. In many cases the concessions were made either without stoppage or with only slight stoppage of work. In the potteries, however, there was a several weeks' strike, ending in the defeat of the workmen.

In the Augsburg textile industry a reduction of the working day from 12 to 11 hours with equal wages took place. The conditions of youthful labour in Niederbayern and Oberpfalz were good in general; the midday pause in work should, however, be increased to at least half an hour. An improvement is taking place in the education of young workpeople, and employers of labour are forced in their own interest to encourage it. No increase of daily output exists. The somewhat reduced hours are balanced by harder work. In Mittelfranken youthful labour is most largely employed in gold thread, brush, and machinery works, and in Oberfranken in china textile and glass works. 94 per cent. of youthful labour is from 14 to 16 years, and 6 per cent. from 12 to 14 years. The proportion has not much changed of late years. The youthful labour was divided by sex as follows:—Boys (Mittelfranken), in machinery, 100 per cent. (no girls employed); in brush factories, 43 per cent.; and in gold thread works, 27 per cent. While in Oberfranken the proportion of boys was:—In china factories, 75 per cent.; in glass works, 97 per cent.; and in textiles, 50 per cent.

Thus we see that girls were chiefly employed in the gold thread, brush, and textile factories. No increase is taking place in small workshops, but the large works are greatly increasing in number and size. In Oberfranken there were many strikes, and often with success. The good feeling between employer and workman was impaired by these constant struggles. The inspector adds that, in his opinion, the appointment of arbitrators is very desirable. In the Pfalz female labour increased 10·2 per cent., male labour 8·6 per cent. Several serious violations of the law on youthful labour occurred, *e.g.*, in certain glass works: not only youths, but children, were kept at work 14 hours and more, and besides and beyond that have to withdraw the glass from the cooling furnace, &c. Again, in certain spinning mills boys and girls were deprived of their mid-day pauses in a working day of 11 hours, and furthermore were kept at work often 12 and 14 hours.

The inspectors report favourably on the increase of insurance against fire, all new works being not only well insured, but having proper means of escape for the workpeople. Willingness and intelligence are shown in many instances in adapting special measures against accidents.

Fireproof material is coming more and more into use, and in particular the use of iron in construction. Only in exceptional cases are fire-proof preparations, such as asbestos paint, employed.

The employment of fireproof cross walls is increasing, only hindered by the counter tendency to give larger and freer space to the workpeople. The use of electric fire signals and the organisation of special fire services in large factories are on the increase, as also improved water supply under pressure, and frost-protected pipes. The means of escape in case of fire was improved, and no factory has less than two exits, while most have several.

Conditions
affecting
health.

No new factories were noticed, and some old abuses ameliorated. The diminution of the quicksilver manufactured lessened the number of cases suffering from mercury poisoning. Efforts were made to improve ventilation, and the partial introduction of the electric light is welcomed.

General and
moral
condition of
workers.

There was no general want of skilled labour. This tended principally to the towns, and consequently many were out of work in winter. In the country, on the other hand, in smaller factories the introduction of labour-saving machinery is a sign that there was some difficulty in procuring skilled labour.

Wages.

In the country the price of skilled male labour was lowest in textile industries, and lightest in parquetry, stove, and glove factories. The following table gives the various scales of wages in Oberbayern and Schwaben:—

	Per Day.			
	Minimum.		Maximum.	
	s.	d.	s.	d.
Male skilled labour	1	3	9	4
" daily labour	1	4	3	3
Female skilled labour	10½		4	0
" daily labour	10½		3	0
			1	1
			1	5

	s.	d.	£	s.	d.
Average men's wages in textile industries				4	0
" iron manufacture	2	5	to	5	4
" the printing trade				1	0
" in Munich				3	0
" skilled men's wages in Munich generally ..				3	5
" ordinary	2	3		2	9
" the country				2	0
" skilled women's wages in Munich (sempstresses, flower makers, &c.)	1	4		3	5
Generally speaking, however, they may be taken at less than				3	0

With a view to comparison with the above, the following are the prices of some of the principal necessities of life in Munich:—

	<i>s.</i>	<i>d.</i>
1 lb. of cow beef	2	
„ middling veal	6½	
„ pork	8½	
„ fat or lard, middling quality	11½	
3 eggs	2½	
1 lb. of flour	3	
1 hectolitre (<i>i.e.</i> , 22·04 lbs.) of second best potatoes	4	4
1 lb. of second best household bread	1½	
1 litre of summer beer	3	
„ milk	2½	
1 stere (<i>i.e.</i> , 35,316 cubic feet) of middling quality firewood	11	0
1 centner (<i>i.e.</i> , 110·2 lbs.) of middling coal	1	1

Improvements generally have been made in labourers' dwellings, especially in Augsburg. The home for disabled factory hands, established by the late Dr. Biermann at a cost of 100,000 marks, is worthy of all praise.

In Munich, on the other hand, the great building activity does not keep pace with the demand, and it is a standing difficulty for labourers to get decent lodgings.

OBERBAYERN.

The report for 1889 for the province of Oberbayern states that the current year has realised the fortunate promise of 1888, favoured by an undisturbed peaceful development. The course of business has been very active and in most districts profitable. The movements of the labour market were particularly violent, one of the principal features being the miners' strike in May, which for some time disturbed not only many industries but even communications. Although the strike was eventually settled, the price of coal was raised to a very serious extent. Other wages disputes took place throughout Bavaria, and Munich became especially their battlefield. A rise of wages was the general consequence, and that frequently too in industries where no actual strike occurred.

Brewers had a prosperous year, in spite of higher wages and higher prices of raw material. In country districts, however, the usual complaints of poor trade were repeated. The spirit producers complained loudly of the difficulty caused by the provisions of the new brandy excise law.

The wholesale trade in colonial wares was very satisfactory; on the other hand, the retail trade gave very chequered results, partly owing to high shop rents and partly to keen competition. The regular course of the coffee business was upset by the unhealthy and disturbing influence of the Hamburg coffee speculation trade in "futures." The indiarubber trade was good. Leather production has been flourishing, owing to numerous orders from the army and from new establishments. The leather glove trade had plenty of orders and of work, but the rise in price of

new materials, combined with the low prices of the finished article, told heavily on profits. The fur trade was unsatisfactory, with some exceptions. The trade in skins and hides also gave ground for complaint, but the business in sheeps' wool was good. Similar complaints were made by the locksmiths. A lively business was done in wax, though profits did not increase as much as sales. The brush trade was satisfactory, and so were the earthenware, brick and tile, and cement manufactures, but the dearness of coal reduced profits. Business in stone and earths, and in general all trades connected with building, prospered.

The greatest rise in price was in coal, and the coal trade passed through a most prosperous year. The natural result was to raise the price of peat, and in this business also good profits were made. Copper recovered from the wild speculation of 1888, and a satisfactory business was done. Machinery construction (especially locomotives) prospered, and so did the manufacture of chemicals for use in agriculture. In both these branches sales extended more than profits. Cotton spinning also suffered from dear coal. In manufactured cottons, silks, and millinery, business was very good. The drapery business was also good for the first nine months of the year, but fell off in the last quarter. The tailoring trade was good for the first half year and poor for the second half year, while the same may be said of the mantle business, which was unfavourably influenced by the fine weather.

The paper manufacture has been very active, but a fall in prices told on profits. Printing and bookbinding flourished, but considerable wage disputes had to be fought out. 1889 was very favourable to the timber and sawing trades, which profited highly by the building activity in the large towns. This also benefited the parquetry trade, though complaints were made of competition. In the furniture trade the large establishments prospered at the expense of the smaller. The match trade suffered in its considerable export, under the high Austrian and Italian tariffs. The umbrella trade suffered much from competition of pedlars and touts. The opticians did a good business, and art manufacture flourished in Munich. The average wholesale prices of the principal articles of commerce showed a notable increase over 1888 and former years.

The articles which most increased in price were rye, 7 per cent.; potato spirit, 9 per cent.; pig iron, 12 to 15 per cent.; coal, 20 per cent.; coffee, 18 per cent.; tobacco, 7 to 18 per cent.; cotton, 6 per cent.; and wool, 7 per cent.

The only articles which declined in price were barley, about 3 per cent.; lead, 7 per cent.; pepper, 11 per cent.; raw sugar, 15 per cent.; and copper, some 30 per cent.

The money market was in a satisfactory state, owing to the calm in general politics; and the Bavarian stock exchanges were comparatively free from the violent movements of the Berlin Bourse.

The dividends of the principal Munich commercial companies were well maintained, and in some cases showed an increase.

As far as can be judged from the general German export statistics, Bavarian export trade to foreign countries, as a whole, is not flourishing.

Complaints of foreign hostile tariffs continue unabated, and on all sides a desire for improved commercial treaties is expressed.

The prohibition of the import of swine has markedly raised the price of pork, a very general article of food among the working population, some 10 to 12 per cent.

The graduated malt tax (see Report on beer*) forms a greatly increased burden upon the large brewers. It is too soon as yet to fully estimate its effects, but it may be said that it constitutes a kind of progressive increase tax on brewers, for it is not the case, as some suppose, that the large brewers have any special advantage *ipso facto* over the small ones as to the greater production of beer from a given quantity of malt. In that respect the size of a brewery confers no advantage. Great speculations in coffee for future terms have been made principally at Hamburg, and are much complained of as most injurious to sound trade, and as being nothing more nor less than desperate gambling. The Chamber of Commerce for Oberbayern has condemned the practice in no measured terms, but the Chamber of Commerce for all Germany has declined to interfere. Attention is also directed to the importation of Gassen's artificial coffee from Cologne into Bavaria by the firm of Messrs. Jean Heckhausen and Weies. The beans are said to resemble natural coffee very closely indeed, and though the goods are specially marked this trade is said to be a direct temptation to fraud. Much desire was expressed for better and more frequent passenger and goods trains to Italy by the Brenner and St. Gothard routes, the Brenner route to many parts of Italy from Berlin being shorter than the other. Doubling of the permanent way on many lines is also demanded. The want of a large harbour on the Main for floating timber is also much felt.

The Oberbayern Chamber of Commerce give expression further to several commercial wants, such as the raising of the limit of weight of a 10 cent letter from 15 to 20 grammes, the improvement of telephonic communication, the withdrawal of restrictions on tobacco factories in Bavaria, and the improvement of the parcels sample post.

The export from Bavaria to North America is largely increasing. The export in 1889 from the United States Consular districts of Munich and Augsburg to the United States during the year reached 1,027,605 dol. 84 c., thus for the first time exceeding 1,000,000 dol.

In cotton yarns several firms during the year have been supplying so-called "cheap" yarn, sample parcels of which, for instance, weigh 4 lbs. instead of 5 lbs., the proper weight, a difference of 20 per cent. By this means the public are deceived, and other respectable firms are more or less obliged to do the same in self-protection. Appeal has been made to the Ministry of the Interior to prohibit the practice.

* No. 171 Miscellaneous Series.—Ed.

OBERPFALZ.

From Oberpfalz the report comes that, whereas 1888 showed a general improvement in trade, 1889 gives a still more satisfactory development, and a general growth of commerce, thanks to the continuance of peace. In the greater part of the local reports the former complaints of declining trade, depressed prices, and over-production were not repeated, and it is recognised that markets are more active and profits more satisfactory, particularly in the timber, glass, iron, and stone trades.

The increase in building activity reached favourably on production in general, and this, added to enlarged consumption, caused a diminution of complaints, although it is true that the small workshops continue to suffer from the crushing rivalry of the large factories. Wages were normal, and supply and demand balanced each other. No strikes took place. In art manufactures there were satisfactory signs of growth and progress, thanks to the energetic encouragement of the Bavarian Government and increased demand on the part of rich purchasers. The exhibitions and similar measures of the Ratisbon Chamber of Commerce assisted also the development of trade. The Danube traffic was extremely active, and would have surpassed that of 1888 if early frosts had not closed the river before the usual time. Further increase of the traffic is being provided for by extensions of the harbour and warehouses at Ratisbon. To judge by the signs of the times, the period of activity in trade and manufacture will be succeeded by quieter years, the termination of commercial treaties in 1892 having a discouraging effect on enterprise and speculation.

In metal leaf, bronze, paints, and production a marked declining tendency was noted, due to great over-production. Prices were much depressed, and a crisis is feared. In the book trade, while there was a certain activity and development, great complaints were made of hindrances in foreign countries to the transport of books, height of Consular fees, and excessive freights charged on small parcels of books.

Iron manu-
facture.

Business on the whole favourable, though in the first part of the year prices showed no decided tendency to rise. The strike of the coal miners in May altered the whole situation. Besides disturbing business greatly, it forced up the price of coal and coke 300 to 400 per cent., and produced something like a coal famine. Pig and old iron went up in price later in the year in connection with the above circumstances, and the manufacturer had to deliver goods under contract at former prices, in spite of the rise in price of the raw material.

Nursery gardening and the flower trade suffered from over-production, and the powerful competition from South France and Italy. Import duties are demanded.

Glass manufacture was flourishing, and prices rose steadily. The export trade to North America, particularly in mirrors, showed especial activity.

Timber trade

The course of business for 1889 was satisfactory, and prices

showed a continuous rise. However, net profits were only moderate, as the price of unsawn timber rose in a still higher proportion. The great activity in the sawing mills on the Rhine and Middle Germany caused a large demand for Bavarian unsawn timber, but at the same time this caused also severe competition with the Bavarian sawing mills. A reduction of railway rates is generally demanded to enable Bavarian sawn timber to compete on the Lower Rhine with timber from the North, and to compete in Saxony, &c., with Austrian timber. Even as far up the Rhine as Mannheim Swedish timber is transported at equal rates with those paid on timber from South-Eastern Bavaria.

Business steadily improved. The price of sawn wood rose so much that import from abroad became profitable. The manufacture of parquetty floors has much increased, and the large factories are driving the small works out of the trade. Austrian competition through Trieste and Fiume is threatening the hard-earned Bavarian market in England, and only the best goods can hold their own. Parquetty and sawn wood.

The production of boilers was very active in 1889, and especially for large hotels and military purposes. Boiler works.

A reduction of output and an increase of profits is reported. A general improvement in the prices of flour, &c., benefited Bavarian millers, though only partially so. The free import of bran into Germany, combined with the tax on grain, is stated to act very injuriously on the milling interest. Mills.

On the whole, trade was satisfactory, but a much smaller area of rape was cultivated, and the crop was very small. High prices ruled, but for greasing machinery cheap substitutes were generally employed. Oil works.

Over-production is general, and the situation not a favourable one. It is considered that the low prices consequent on over-production have reached their climax, and that a change must follow, the prices of raw materials generally having risen. Paper making.

The profits and sales generally improved.

The returns show great activity and a busy trade, which would have surpassed 1888 but for early frosts suddenly stopping the traffic, and detaining 4,400 waggon loads of plums and various fruits, flour, wood, &c., at the different stations. It was calculated that with ordinary weather the traffic totals of 1888 would have been considerably surpassed. Large quantities of rough timber were awaiting the opening of navigation in 1890. China factories.
Danube traffic.

1889 was only an average year. Complaints were made of the high price of raw material, and of competition. Soap, candles, and perfumery

Little improvement in business was reported, a slow increase of consumption being noted. Spirit refineries.

A satisfactory year on the whole is reported in hewn stone works.

Improvement in trade took place, but the price of the raw material rose greatly, and, as competition increased, profits were sharply cut down. The trade in cigars increased. Tobacco.

Profits were small, owing to severe competition, causing very Velocipede works.

low prices, while, through constant strikes, material was 50 per cent. higher, and wages rose.

Wine trade.

The year was unfavourable throughout Germany. The trade in Hungarian wine improved. From the "enclave" of Amberg an average year was reported.

SCHWABEN.

Textiles :
cotton spinning.

525,316 spindles were in existence, and of these 495,332 were on an average at work, being an increase over 1888 of 27,000 and 9,500 respectively. The establishment of a new cotton mill partly caused the increase. The general results have been fair. The conditions of the markets underwent a change, partly through the competition of the cotton mills in Alsace and Rhenish Westphalia. The hours of labour were reduced, not in reply to direct demands, but with a view to nipping in the bud a threatened agitation.

Cotton weaving.

A great change in the state of business took place in the year, which opened with over-production, wretchedly low prices, and a hopeless outlook. At the end of the year the supply could not meet the demand, and there were rich opportunities of obtaining highly satisfactory future contracts. The causes were partly the fine spring weather, partly the general industrial improvement, and partly the fact that the over-production proved to be less excessive than was generally expected. The expectation of a fall in prices led to a reduction of stocks, so that the demand became greater than the supply, and the price of cotton stuffs rose from April to December some 20 per cent., while the price of yarn only rose some 8 per cent.

The depressed state of cotton-weaving reacted on the weaving-rooms for coloured stuffs, and competition from North Germany also injured them; however, the improvement in trade had its effect here also. Of the 11,974 looms existing, 11,340 were on an average at work, an increase of 446 and 106 respectively over 1888.

Outfitting and
finishing
workshops.

Business was active and demand brisk. Some improvement took place in the year, but the price of materials also rose. The outlook for the spring of 1890 is a decline in prices, and it is to be hoped manufacturers will continue firm and try to steady the markets.

Cotton twist
and sewing
thread.

A small improvement in the spring was again lost in the summer, and the rise in the price of materials more than balanced it.

Cotton
printing.

The markets were, on the whole, favourable, but the rise in raw materials prevented any marked improvement.

Corded yarn.

The year began quietly, and improved business followed. There was a slight recoil in November, but, on the whole, trade was good, though profits were not high.

Hemp and
twine
spinning.

The increase in demand did not keep pace with production, and, in order to keep down stocks, it was necessary further to reduce prices already low. If any profits at all were made it was due to the very low price of raw materials.

The quality of raw material was poor, which, of course, told against the manufactured article. Good flax yarns, coarse and fine, were in demand, and rose in price. On the whole the year was a fair one, coming after several bad years.

Machine flax spinning and linen weaving.

Business was good on the whole, and the demand steadily rose. The American competition continues to increase and to injure Bavarian trade.

Watch springs and compass-saws.

Complaints were general of hostile tariffs. Prices fell and production was reduced. In the wax trade markets were better, but prices were still low.

Machinery manufacture.

Business active and markets good. Raw materials rose in price, inducing a corresponding rise in the finished article.

Chemical works.

Business satisfactory. The rise in the price of raw materials told on profits. Good orders were in hand for the forthcoming year.

Frame making.

An extension of trade was reported. Prices continue low.

Straw hat making.

Business was not unsatisfactory, and the reports were favourable. Building activity had a very satisfactory influence on the cognate trades. The usual complaints continued as to competition, colportage, &c. New complaints were made respecting the competition of the German Officers' Association in Berlin, a branch of which it is proposed to establish in Bavaria.

Retail trade.

Companies for furnishing the necessaries of life, *e.g.*, bread and sausages, in Augsburg are the cause of great complaints by the retail traders. Favourable reports are received from the brewers, bakers, builders, carpenters, and cognate trades, clothing establishments, and art industries. A general improvement in the productive power of labour is noticed.

An extraordinary movement in prices took place and still continues. Early in the year the demand for certain sorts of iron increased, while a further rise took place in May, consequent on the strike of coal miners. Stocks were soon exhausted, and production was reduced for want of coal. On the resumption of work manufacturers were encouraged to replenish their stocks, and orders being numerous, especially from the railways, it became necessary to ask long terms for execution. Prices rose in the year in various sorts of iron from 20 to 50 per cent. The price of tin rose considerably, while that of copper, through the collapse of the copper ring, fell as largely. Dealers were forced to retain their custom by a sacrifice of profits in view of the great rise of raw material. The strikes caused much disturbance in the execution of orders.

Iron trade.

Business was generally favourable. Unsawn timber, in consequence, showed a rising tendency.

Timber trade.

Business was satisfactory in general. Cotton stuffs rose in price early in the year, and a further rise took place in autumn. The principal demand was for printed cretonnes, &c. Woollens were in less demand. The increase of colportage and sales by house-to-house travellers is enormous. It is stated that this is an injury rather than a benefit to trade, and is the result of overproduction. In the Allgäu trade was bad, and the same complaints were made.

Manufactured stuffs, &c.

Spirits, brandy, and inferior spirits. Colonial productions, groceries, and dutiable articles.	Business was unfavourable. Sales have fallen off since the introduction of the spirit tax, and prices were low through competition. No great variation of price took place.
Coffee	In certain articles trade was very good, <i>e.g.</i> , sugar, which, through the failure of sugar crops in Java, Brazil, and Cuba, and the small beet crop in Europe, rose in price from March to April 30 per cent. A ring in Magdeburg tried to force prices still higher, but the attempt failed, and with new and good beet crops prices fell to the same level at the close of the year as at its beginning. Reports of failure of crops in Brazil caused great variations in price. Attempts to artificially force up prices in Hamburg, however, broke down, and they fell in the autumn to an average. Direct communications with producing countries are being more and more set up, especially from Augsburg, and with good result.
Fruits.	Fruits from the south were short in quantity and in demand. Dried plums were cheap, and at first little in request, though later the demand rose.
Cloverseed.	Business was unsatisfactory. Prices declined during the season, and the prospect for 1890 was unfavourable.
Oil.	Rice was also stationary. Petroleum and linseed oil remained almost unaltered through the year. Olive oil rose much in price and demand through the falling-off of supplies, and poppy oil through the failure of the Indian crop.
Spices Cheese and butter (Allgäu).	Spices were on the whole stationary, or slightly improved. Milk was a $\frac{1}{4}$ d. a quart dearer than in 1889. All sorts of cheese rose in price in response, markets being favourable and demand brisk. Butter also found good sales at satisfactory prices. The attempt to get rid of the middleman by sending butter through the parcels post is increasing.

NIEDERBAYERN.

The report, after alluding hopefully to the energetic social reforms set on foot by the German Emperor, mentions the numerous strikes for higher wages and shorter working hours which marked the year 1889. Doubtless some of the workmen's demands are reasonable. At the same time foreign competition is so keen, and the burdens already laid on German industry by associations for insurance against accidents and old age, and for relief in case of sickness, &c., are so great, that it will be wise to limit further increases of such burdens. The proposal for eight hours' work a day to meet the scarcity of work and superabundance of workmen is regarded as utopian. If such a proposal could be carried out the loss would fall on the artisan, for the manufacturer would be driven to employ more and more labour-saving machinery. It is to be hoped that events will belie these fears. The year 1889, though to be considered a favourable one in almost all branches of trade, was not without its threatening signs. The great number

of strikes and the coal famine led to many disappointments in the profits of the year. Numerous contracts were entered upon under very different circumstances from those in which they were executed, and the high profits expected turned out infinitesimal. The coal famine acted very injuriously on industry in many coal districts.

The large orders for the navy and the State railways gave a temporary fillip to German industry, and, as a consequence, foreign trade was somewhat neglected, a fact which may have injurious results in the near future.

Complaints are made in the sawn timber and allied trades of the great rise in the price of rough timber. The match and carved wood trades suffered more than the sawing mills, who were able to recoup themselves through the activity in building. The granite works had an active business and got rid of all their accumulated stocks. The smelting works, steam corn mills, hewn stone and brick and tile works all had a good year. The reports from the following were only middling, but still gave no actual ground for complaint: glass, enamelling, wood-dust and wood-pulp, bone dust, glue, and pressed yeast works.

The retail trade was not unsatisfactory, always allowing for the repeated complaints of the regular traders against colportage. They have also difficulty in holding their own against the wholesale works, and this is partly their own fault, owing to carelessness in business, &c. The great activity among workmen in the building trade shows sufficiently that the general course of business is good.

A word of praise is due to the labour associations, which have done good service now and again in arranging strikes and promoting the weal of industry generally.

I regret to state that the remainder of the provincial reports on the commerce of Bavaria for 1889 have been unusually delayed this year, and will not appear for some little time. I have, however, obtained the following data privately:—

OBERFRANKEN.

The state of trade in Oberfranken has improved in a marked and satisfactory degree. In particular the staple industries of spinning, brewing and malting, building, tile and brick making, granite cutting, and china making report that the past year fully answered to expectations.

Complaints were heard only in the tobacco business and (so far as the second half-year was concerned) in machine weaving. Wages rose in correspondence with the rise in price of all necessaries of life. No strikes of any consequence took place, except in the building trade.

The number of protested bills in Munich in 1889 was 6,000, as against 5,929 in 1888 and 5,270 in 1881.

In conclusion, it may be remarked that the course of trade in Bavaria for the three years under review has been singularly even, showing a continuous and steady increase, only varied by the coal-

miners' strike, the coffee speculation, and the action of the swine import law, and swelled by the really remarkable and increasing building activity in Bavaria, and the wonderful hop crop of 1889, which greatly benefited the brewing trade.

I desire to express my best thanks to Dr. Kahn, Secretary of the Chamber of Commerce for Oberbayern, for his kind and valuable assistance.

Munich, July, 1890.

H. A. HELYAR.

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DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

G R E E C E.

REPORT FOR THE YEAR 1888
ON THE
TRADE AND AGRICULTURE OF CEPHALONIA.

*Issued during the Recess and Presented to both Houses of Parliament
by Command of Her Majesty.*

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GREECE.

CEPHALONIA.

Consul Reade to the Marquis of Salisbury.

My Lord,

Corfu, July 20, 1889.

I HAVE the honour to transmit herewith a Report on the Trade and Agriculture of Cephalonia for the year 1888.

I have, &c.

(Signed) R. READE.

Trade Report for the Year 1888.

RETURN of all Shipping at the Port of Cephalonia for the Shipping Year 1888.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number.	Tons.	Number.	Tons.	Number.	Tons.
British ...	...	...	15	12,998	15	12,998
Greek ...	158	17,784	...	...	158	17,784
Italian ...	25	2,958	...	...	25	2,958
Belgian ...	...	...	7	5,550	7	5,550
Dutch ...	...	...	5	4,409	5	4,409
German ...	...	...	4	2,985	4	2,985
Other countries ...	10	426	1	279	11	705
Total ...	193	21,168	32	26,221	225	47,389
" for the year preceding ...	455	23,836	37	29,929	492	53,765

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number.	Tons.	Number.	Tons.	Number.	Tons.
British ...	...	...	15	12,998	15	12,998
Greek ...	160	18,150	...	...	160	18,150
Italian ...	24	2,816	...	...	24	2,816
Belgian ...	...	...	7	5,550	7	5,550
Dutch ...	...	...	5	4,409	5	4,409
German ...	...	...	4	2,985	4	2,985
Other countries ...	10	426	1	279	11	705
Total ...	194	21,392	32	26,221	226	47,613
" for the year preceding ...	448	22,350	37	29,929	485	52,279

Cephalonian
ships.

The number of vessels belonging to this island, and that of Ithaca, at the close of the year was 309, and their burthen 28,413 tons.

British
shipping.

The first place in the exporting trade is still held by the British flag, for out of 9,502 tons 3,893 tons were shipped in British bottoms.

The import trade, however, continues to be carried on by Greek sailing vessels, and by the Greek and Austrian mail steamers.

The following table serves to classify the shipping in the year 1888, according to the nationalities respectively employed in the carrying trade.

Nationality.	Quantity Exported.	
	1888.	1887.
	Tons.	Tons.
British	3,893	2,256
Greek	13	83
Belgian	2,911	1,256
Dutch	1,811	2,094
German	802	3,816
Norwegian.. ..	72	44
Total	9,502	9,554

Freights.

The rates of freight effected from Cephalonia in 1888 were as follows:—

Destination.	Rate of Freight.		
	s.	s.	d.
United Kingdom	20 to 22	6	6
Holland	20	27	6
Belgium	20	25	0
Hamburg	20	30	0
New York	30	0	0

Trade and
commerce.

The year commenced well, for the remnant of the crop of 1887 was disposed of at very satisfactory prices, say about 20s. f.o.b., and everybody hoped that the new crop would average equally as well.

The season opened with prices equivalent to 16s. 6d. f.o.b., which though not very high were still satisfactory, but the largeness of the crop, particularly that of the Morea, soon began to influence the consuming markets, and prices continually declined until they reached, in December, the low price of 11s. f.o.b., thereby reducing the average price of the season to about 15s. f.o.b. The stock of unsold fruit at the end of the year was, consequently, larger than usual, being about 3,500 tons, or over one-third of the entire crop.

The low prices obtained for the staple produce of this island have naturally exercised an unfavourable influence on the import trade, for the peasant proprietors, have for the most part been unable to pay off the advances they had received in the early part of the year for the cultivation of their little properties, and the larger proprietors have also been constrained to curtail their expenses as much as possible to make both ends meet, for unfortunately the prospects for the coming season are also unfavourable.

Now that the consumption of currants in France has declined, and according to all appearances will continue to decline, particularly if the new duty talked of be eventually imposed, the crop will largely exceed the requirements of the other markets, and prices must rule low till a new outlet is found for this produce, or the unremunerative prices cause a falling-off in the quantity grown by reducing the area under cultivation.

RETURN of the Principal Articles of Export from Cephalonia Exports.
during the Years 1888-87.

Articles.			1888.		1887.	
			Quantity.	Value.	Quantity.	Value.
Currants (crop 1887)	Tons	...	1,800	£ 36,000	9,354	£ 132,750
" (" 1888)	"	...	6,306	94,590	...	...
" (provincial)	"	...	1,246	16,750	...	...
Wine, spirit, &c.	Gallons	...	185,000	11,200	190,000	11,500
Olive oil	Tons	...	350	13,125	200	6,000
Other articles	...	...	...	6,750	...	7,000
Total	...	...	...	178,415	...	157,250

Imports.

**RETURN of the Principal Articles of Import into Cephalonia
during the Years 1888-87.**

Articles.					1888.	1887.
					£	£
Cereals					82,500	85,000
Coffee					9,570	11,000
Sugar					19,500	21,000
Rice					3,000	4,000
Other colonials.. .. .					1,350	1,500
Groceries					6,000	6,750
Animals for slaughter					8,000	7,500
Fish					13,200	9,000
Tobacco					12,500	14,750
Cotton textiles, &c.					28,500	29,000
Woollen and part woollen textiles					6,000	7,250
Other textiles					3,500	4,500
Other manufactures					4,000	4,700
Sulphur					3,150	3,200
Petroleum					6,000	7,250
Coal					1,200	980
Iron, hardware, &c.					6,000	7,000
Timber, building and other					10,000	8,650
Medicinals, drugs, &c.					3,000	3,750
Hides and leather					6,000	8,000
Paper, stationery, &c.					3,000	3,900
Wax candles, &c.					1,500	2,000
Glass and earthenware					1,450	1,750
Other articles					8,400	9,750
Currants (provincial for export)					14,610	..
Total					261,930	262,180

The falling-off in the imports, owing, as already stated, to the low prices realized by growers, and partly also on account of the high and fluctuating rates of exchange, was well nigh general as will be seen from the above table. Unfortunately the still lower prices obtained since last December, and the discouraging prospects for the coming season, have, by considerably weakening the tone of consumption, depressed trade still further, and the imports in 1889 show, so far at least, a marked decline.

TABLE showing the Total Value of all Articles Exported from and Imported to Cephalonia from and to Foreign Countries during the Years 1888-87. Exports and imports.

Countries.	Exports.		Imports.	
	1888.	1887.	1888.	1887.
	£	£	£	£
Great Britain	15,750	7,500	35,470	36,500
Greece	7,375	5,000	54,610	40,780
Russia	13,500	6,150	66,000	67,850
Austria and Germany ..	17,000	30,000	44,900	47,550
Holland	27,000	78,000	..	..
Italy	890	4,400	26,000	25,750
Turkey	2,500	4,000	18,50	20,000
France	1,250	9,000	10,500	16,500
Belgium	20,000	13,200	100	..
United States	3,150	..	6,000	7,250
Total	178,415	157,250	261,930	262,180

The exchange was high last year also, the average rate for three months bills on London being 31.50 dol. per £. Exchange.

The value of specie remittances, and of drafts, and money orders during the year, from natives trading abroad, was about 125,000*l*. Remittances.

Besides the above, grain, flour, pulse, groceries, and a few other articles of aggregate value of 7,500*l*., which are included in the general imports, have entered into the island from the same source.

Agriculture was again diligently attended to during the past year, the high prices obtained for the 1887 crop having encouraged proprietors to spare neither pains nor expense.

The result was that the currant crop, which was also favoured by the weather, was a large one, being considerably over the average, amounting to about 9,800 tons. The whole crop of Greece was the largest we have yet had, reaching the figure of 160,000 tons, or 25 per cent. over that of the previous year. It would have been still larger, had it not been for the dry winds prevalent in July, which caused damage both in Cephalonia and in the other currant growing districts to the extent of about 5,000 tons. Currants.

The quality, however, was not, on the whole, as fine as that of the preceding season. It would appear that many growers, seeing the weather uncertain for a few days and threatening rain, had gathered their fruit before it was well dried.

This was mixed up with the other fruit, the difference not being outwardly perceptible, and the consequence was that, as the season advanced, many parcels fermented and turned white, in some instances while still in bulk in the stores, but more frequently after being packed.

The grape crop likewise promised to be an abundant one, but the above-mentioned dry winds caused even more serious damage to the grape than they did to the currant wines; some qualities, the muscatels, for instance, which produce the choicest and best flavoured of the Cephalonian wines having suffered more in proportion than the hardier plants.

The vintage, therefore, was not so plentiful as it had been anticipated, the quantity of wine produced being about 1,650,000 gallons.

The quality of the wine was good, on the whole, and prices were satisfactory. The commoner wines are selling on the spot for home consumption, and, for export to the levant, &c., from 1*s.* to 1*s.* 6*d.* per gallon, while the better qualities, which continue to be in demand in Germany, are selling from 2*s.* 6*d.* to 3*s.* per gallon f.o.b. and upwards, according to their age.

Olive oil.

The crop was an average one, the yield being estimated at about 30,000 Ionian barrels, or 480,000 Imperial gallons. Comparatively little was available for export, almost the entire quantity being required for local consumption. The price at which the liquid is selling is 4*s.* per gallon, or about 38*l.* 10*s.* per ton f.o.b.

Grain and pulse.

The harvest fell short of that of the previous year, the quantity yielded sufficing only for about three months' consumption.

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FOREIGN OFFICE.
1890.
ANNUAL SERIES.

Nº. 644.
DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

G R E E C E.

REPORT FOR THE YEAR 1889
ON THE
TRADE OF PATRAS.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 457.

Presented to both Houses of Parliament by Command of Her Majesty,
FEBRUARY, 1890.

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1890.

[C. 5895—47.]

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580. Warsaw	½d.	642. Cherbourg	½d.
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No. 644.

Reference to previous Report, Annual Series No. 457.

GREECE.

PATRAS.

Consul Wood to the Marquis of Salisbury.

My Lord, *Patras, January 25, 1890.*

I HAVE the honour to transmit, enclosed, my Commercial Report of the Trade of Patras for the Year 1889.

I have, &c.

(Signed) THOMAS WOOD.

*Commercial Report on the Trade of the Consular District of Patras
for the Year 1889.*

During the spring and summer of the past year the weather was very suitable for crops of all kinds, but the autumn was unusually dry, so that it was difficult to cultivate land for the sowing of wheat, and the crop of olives suffered from the intense heat.

EXPORTS.

The currant crop is estimated at 143,000 tons, including Ionian Currants. Islands, against 160,000 tons in 1888; but about 7,000 tons remained over when the new crop was ready, and a portion of this was shipped to France and England, but no separate note was kept.

The weather was very suitable for the drying of currants, and none were damaged by rain. In some districts the fruit suffered from a dark rot, similar to the description of the black rot in France, from which the vines there are suffering, and it is feared that unless some remedy is found it will greatly diminish the next crop of currants. Phylloxera has not yet attacked the vines in Greece. Sulphuring is still carried out as a preventative against oidium.

(800)

Quantity
shipped.

The shipments during last year from the various places of growth compared with those of 1888 are as follows:—

	1888.	1889.
	Tons.	Tons.
United Kingdom ..	51,856	49,923
Canada	1,615	1,184
France	18,412	38,391
North of Europe..	18,749	8,938
Trieste	2,255	1,315
Russia	517	132
United States ..	12,513	7,685
Australia.. ..	1,111	873
Total	107,028	108,441

Stock of
currants.

The stock of currants unsold and held for shipment at the end of 1889, including the islands, was about:—

	Tons.
Calamata.. ..	5,000
Provinces	4,000
Pirgos and Gastuni ..	15,000
Patras	4,250
Vostizza	300
Nauplia	400
Islands	6,000
Total	34,950

Against last year's stock of 53,000 tons at same time last year.

Shipments of currants to England for five years:—

	Tons.
1885	55,765
1886	48,892
1887	55,459
1888	51,856
1889	49,923

In consequence of a large quantity of old fruit which remained over in England and the Continent, bought at a very low price, the consumption of new currants fell off very much.

The proposed increase of import duty in France has not yet been carried out, but it is proposed to do so as soon as the question is again discussed in the French Chambers.

Price of currants opened at:—

	£	s.	d.	
Vostizza, choicest..	1	8	0	per cwt. f.o.b.
„ ordinary ..	1	4	0	„ „
Patras, finest ..	1	0	0	„ „
„ average ..	0	17	0	„ „
Gulf, good to fine ..	0	18	0	„ „
„ Pirgos ..	0	14	0	„ „
Provincial, best ..	0	14	0	„ „
„ average ..	0	13	3	„ „

And a decline of 20 per cent. has taken place in the various qualities.

Unless a very high duty is imposed on currants in France it is likely that prices will remain stationary for some time.

Five years crop of currants :—

							Tons.
1885	..	..	..	..	..	..	110,000
1886	..	..	..	..	..	..	127,562
1887	..	..	..	..	..	..	127,000
1888	..	..	..	..	..	..	160,000
1889	..	..	..	..	..	..	143,000

No plants, or potatoes, or vegetables are allowed to be im-ported for fear of the phylloxera being brought into the country. Precaution
against
phylloxera.

Value of exports by British vessels has been :—

							£
1885	..	..	..	..	..	..	1,315,200
1886	..	..	..	..	..	..	1,044,540
1887	..	..	..	..	..	..	1,308,590
1888	..	..	..	..	..	..	1,117,570
1889	..	..	..	..	..	..	1,080,260

The produce of Pirgos, Calamata, and Nauplia is included in the above value.

Valonea crop of Greece is estimated at :—

					1887.	1888.	1889.
					Tons.	Tons.	Tons.
Etolia	..	..	..	..	3,750	2,812	1,875
Cape Papa	..	..	..	..	600	501	875
Maina	..	..	..	..	3,000	4,125	1,925
Total	..	..	..	..	7,350	7,438	4,675

Prices have ruled high, say from 12*l.* to 13*l.* per ton, f.o.b., according to quality, as the crops are deficient in most places of growth. Several vessels have been chartered to load for England, and considerable shipments have been made for Trieste.

Olive oil crop has been very short in the various places of Olive oil. growth, and prices too high to admit of much margin of profit by exportation. Last year the quantity exported was 4,880 tons, and in all probability not over 2,000 tons will be shipped mostly for Russia.

Wine crop was not large. The value of wine shipped to Antwerp, Hamburg, Rotterdam, and Amsterdam, was 15,409*l.* against 14,124*l.* last year, and cognac 198*l.* against 154*l.* in 1888. Wine.

It is proposed to form a Greek company for the making of wine and cognac from currants; and from the experience so far gained, the wine and brandy distilled and made have proved of excellent quality, and keeps improving after many years.

The increasing growth of currants in Greece obliges agriculturists to encourage any new means of using the fruit produced by them, as it will be impossible to consume all for eating pur-
(800)

poses, and it is earnestly hoped here that the British Government will abolish the duty on currants, which it is said would increase the import of goods from England.

Prices of
exports.

The following prices were paid :—

Articles.					Prices.			
					£			d.
Tobacco	..	..	..	..	Cwt.	..	3	0
Valonea	..	..	..	..	Ton	..	12 to 13	0 0
Fustic	..	..	..	..	"	..	4	0 0
Cotton	..	..	..	..	Lb.	..	0	0 6
Wool	..	..	..	..	Cwt.	..	2	16 0
Figs	..	..	..	..	"	..	0	12 0
Sultana raisins	..	..	..	..	"	..	1	10 0

Cereals.

The crop varied, in some places it was very abundant, in others poor.

The following price was paid for local consumption :—

Articles.					Prices.			
					£			d.
Wheat	..	..	..	..	Imperial Quarter ..	..	2	2 6
Maize	..	..	..	..	"	..	1	10 0
Barley	..	..	..	..	"	..	1	4 0
Oats	..	..	..	..	"	..	0	16 6
Potatoes	..	..	..	..	Cwt.	..	0	10 0

Import trade.

The trade has been less than usual during last year, partly owing to the disastrous result of the operations in the currant crop of 1888, the very high import duties, and the loss in exchange in consequence of the depreciation of the paper currency. Importers of goods have good hopes for the future, especially as their purchasers have now the facility of coming by rail from many distant points.

Designs of English manufactured goods are very much improved, and colours are much brighter and faster. Some of the goods from England have taken the place of a deal of French and Swiss articles, and it is very evident that much more pains and care are taken by English manufacturers.

Mattresses are now made with various pretty coloured stripes instead of the old-fashioned dull stripes and colours.

Light cloth of red colour was formerly imported from Switzerland, but it is now brought from England, colours being bright and fast.

Passage carpets are now being imported from England in considerable quantities. Goods of mixed wool and cotton are not so well made as those from abroad, and, consequently, a small quantity comes from England.

The quantity of manufactured goods from England was about 20 per cent. less than the previous year, but I am told that this is not likely to be the case during 1890.

The following have been the prices of goods imported duty paid, compared with the previous year:—

Articles.		1888.	1889.
		£ s. d.	£ s. d.
Maddapolams	40 yards..	0 13 0	0 13 6
" prints	20 " ..	0 7 8	0 7 9
Cotton, water twist, No. $\frac{1}{14}$, per 10 lbs.			
bundle		0 13 0	0 13 3
Grey cloths, T, 24 yards per piece, $6\frac{1}{2}$ lbs.		0 7 10	0 7 11
" " " " " " " " " " " "		0 9 1	0 9 0
Lead	Cwt. ..	1 5 0	1 7 0
Sugar	Bags ..	2 6 8	2 5 9
"	Barrels ..	2 12 6	2 12 0
Coffee	Cwt. ..	7 4 0	7 4 0
Pepper	" ..	5 14 8	5 14 8
Alum	" ..	0 10 0	0 10 0
Iron bars	" ..	0 9 3	0 9 3
" hoops	" ..	0 6 2	0 6 3
" sheet	" ..	0 8 0	0 8 1
" Swedish	" ..	0 11 4	0 11 6
Copper sheets	" ..	5 10 0	5 10 0
Tin in bars	" ..	0 19 6	0 18 9
Tin in plates, T.C.	Box ..	0 16 0	0 16 0
Dry hides	Cwt. ..	6 5 0	6 5 3
Red herrings, per half barrel	" ..	0 8 6	0 8 0
Coals	Ton ..	1 2 6	1 2 8
Salmon	Tierce ..	5 10 0	5 5 0
Codfish	Cwt. ..	1 3 0	1 0 0
Rice	" ..	1 6 6	1 5 6
Rum	Gallon ..	0 3 5	0 3 5
Petroleum	Case ..	0 17 4	0 18 2
Indigo	Cwt. ..	3 6 0	3 3 0

The value of imports by British vessels for five years was:—

	£
1885	210,000
1886	236,100
1887	291,500
1888	283,700
1889	210,660

The import of coal last year was 17,998 tons, against 19,023 Coal. tons in 1888, and 20,723 tons in 1887.

Prices varied very little, having been 22s. 6d. and 25s. per ton in store.

No sulphur was brought from Milos for sulphuring the vines, Minerals. this was imported from Sicily.

Exchange rates were as follows, for paper money :—

						Per £ Sterling.
						Drachma.
January ..	..	..	..	..	..	31'00
February..	..	..	..	..	..	31'00
March ..	..	..	..	..	..	30'00
April ..	..	..	..	..	..	30'50
May ..	..	..	..	..	..	30'20
June ..	..	..	..	..	..	30'40
July ..	..	..	..	..	..	30'60
August ..	..	..	..	..	..	30'60
September	..	..	..	..	..	31'00
October ..	..	..	..	..	..	30'50
November	..	..	..	..	..	30'30
December	..	..	..	..	..	30'35

Par of exchange is about 25 dr. per pound sterling.

Value of imports at Nauplia was about 60,000*l.*, and at Calamata about 215,000*l.*

Shipping.

The British vessels that came to Patras during the last five years, were :—

Year.				Vessels.	Tons.	Crews.
1885	..	..	..	160	128,886	3,351
1886	..	..	..	149	106,715	2,904
1887	..	..	..	134	112,477	3,020
1888	..	..	..	131	116,047	3,039
1889	..	..	..	110	107,691	2,728

Of which five were sailing vessels, of 615 tons.

Freights in the early part of the shipping season were for London, 20*s.*, and 10 per cent.; Liverpool, 17*s.* 6*d.* and 20*s.*, and 10 per cent.; New York, 27*s.* 6*d.*, in full; Continent, 30*s.*, and 10 per cent.; Marseilles, 18 fr. per ton, and 5 per cent.; Rouen, 25 fr., in full, and continued without much decline.

Sailing vessels obtained 30*s.* and 32*s.* 6*d.*, and 10 per cent., for Valonea for England calling for orders.

Steamers under foreign flags competing with English for employment were :—

Nationality.				Vessels.	Tons.
German	..	..	..	19	13,254
Greek	..	..	..	9	7,092
Dutch	..	..	..	5	4,377
Norwegian	..	..	..	5	1,816
Belgian	..	..	..	2	2,363
Italian	..	..	..	2	530
Danish	..	..	..	1	1,097

Italian steamers of Florio Rubatino have opened a new line for goods for Palermo, Genoa, Marseilles, and other ports of France, transshipping goods at Corfu every Thursday fortnight.

Census was taken throughout Greece during 1889, the number of citizens amounted to 2,187,208, of these 1,133,625 were males, 1,053,583 were females, or an increase of 218,925 since former census.

The different provinces were as follows:—

	Males.	Females.	Total.
Attica and Boeotia	140,374	117,390	257,764
Phiotida and Phocis	68,136	68,334	136,470
Elolia and Acarnania	84,214	77,806	162,020
Argolis and Corinth	72,753	72,083	144,836
Arcadia	75,199	73,086	148,285
Achaia and Elis	130,093	97,620	210,713
Laconia	60,725	65,363	126,088
Messenia	97,364	85,868	183,232
Eubœa	53,269	50,173	103,442
Cyclades	66,356	65,162	131,503
Corfu	59,223	55,312	114,535
Cephalonia	38,525	41,653	80,178
Zante	23,333	20,737	44,070
Arta	16,516	16,374	32,890
Larissa	89,516	78,518	168,034
Tricala	75,029	68,114	143,143
Total	1,133,625	1,053,583	2,187,208

Total population 2,187,208

Former census 1,968,283

Increase 218,925

The population of Patras is 25,106 males.

” ” 19,364 females.

Total 44,970

The extent of forest lands is:—

	Acres.
Achaia and Elis	146,640
Vostizza and Corinth	127,200
Arcadia	247,480
Messenia	71,000
Laconia	235,600

Forest land
in the Morea.

The work at the Isthmus of Corinth Canal has been suspended for some months on account of the failure in Paris of the Comptoir d'Escompte. By order of the Greek Government the French chief engineer, Kallenok, has lately carried out a careful survey of the works at the Isthmus of Corinth, and has presented a detailed report upon it, from which it appears that in order to complete the whole work, the outlay of 13,000,000 fr. are still required, say 520,000*l.*, and, as is known, up to this the sum expended has been more than 40,000,000 fr. Endeavours are being made to find a company to continue the works, for it would be a pity that such a very useful enterprise should prove a failure.

The line from Patras to Athens and Nauplia continues in good working order; and that to Pirgos will soon be finished, and is open

Corinth canal.

Railways

for passengers to a good distance, so that it is easy to get by land to Olympia. Other branch lines in the interior have been commenced, but it is doubtful if they will be as remunerative as the other lines mentioned previously.

A breakwater for the protection of shipping is still being worked on, and a small harbour has been made, which is now useful to good-sized steamers.

A new and large building for a custom-house will be erected, which is much required for the storing of goods; a portion of the inner harbour is being filled in, and this causes considerable delay.

Public health has been very good during last year.

Labourers.

It is reckoned that 7,000 Bulgarians and Turks have come to the Morea to dig the vineyards, and this has cheapened labour, which is at 1s. 3d. per day.

Provisions continue the same price as last year.

						Per lb.
						d.
Beef	..	..	..	..	..	6½
Mutton	..	..	..	..	..	6½
Lamb	..	..	..	..	..	8
Pork	..	..	..	..	..	7
Vegetables	..	..	..	..	..	1½
Bread, best	..	..	..	..	..	1½

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565. Séoul	1d.	626. Bogotá	1d.
566. Newchwang	1d.	627. Malaga	2d.
567. Roustchouk and Philppopolis	1d.	628. Porto Rico	1d.
568. Stockholm	1½d.	629. Bushire	2½d.
569. Tonga.. ..	1d.	630. The Hague	½d.
570. Chicago	1½d.	631. Berlin.. ..	1d.
571. Adana.. ..	½d.	632. Adrianople	1½d.
572. Buenos Ayres.. ..	3d.	633. Rome.. ..	1½d.
573. Frankfort	1½d.	634. Santiago	½d.
574. Canton	1½d.	635. Tahiti.. ..	½d.
575. Tamsui	5½d.	636. Maranham	½d.
576. Palermo	3d.	637. Mexico	2d.
577. Amsterdam	1d.	638. Christiania	1d.
578. Ajaccio	½d.	639. Copenhagen	1d.
579. Shanghai	1½d.	640. Paris	1d.
580. Warsaw	½d.	641. Venice	1d.
581. Teneriffe	1d.	642. Cherbourg	½d.
582. Tangier	2d.	643. New York	1d.
583. Surinam	½d.	644. Patras.. ..	1d.
584. Loanda	1d.	645. Bourgas	½d.
585. Alexandria	1d.	646. St. Petersburg	3d.
586. Cagliari	1d.	647. Taganrog	½d.
587. Smyrna	½d.	648. Baltimore	1½d.
588. Mannheim	1d.	649. New Orleans.. ..	2d.
589. Nagasaki	1d.	650. New Orleans.. ..	1d.
590. Hakodate	1d.	651. Samos.. ..	½d.
591. Bushire	1d.	652. Buda-Pesth	1½d.
592. Chinkiang	½d.	653. Tripoli	½d.
593. Pakhoi.. ..	1d.	654. Buenos Ayres.. ..	½d.
594. Hiozo	1½d.	655. Paris	1d.
595. Bangkok	1d.	656. Cherbourg	1d.
596. Sarajevo	1d.	657. Warsaw	½d.
597. Copenhagen	1½d.	658. Rome	1½d.
598. Cephalonia	½d.	659. Saigon.. ..	½d.
599. Chefoo	½d.	660. Buenos Ayres	½d.
600. Guatemala	1½d.	661. Galveston	1d.
601. Tonga.. ..	½d.	662. Galatz.. ..	1½d.
602. Tahiti.. ..	1d.	663. Antwerp	1d.
603. Stettin	2d.	664. Boston	1d.
604. Vera Cruz	1½d.	665. Madeira	½d.
605. Christiania	4d.	666. New Hebrides	½d.
606. Pernambuco	1½d.	667. Riga	1d.
607. Trieste	1½d.	668. Charleston	1d.
608. Tunis	½d.	669. Algiers	2d.
609. Havana	2d.	670. Stuttgart	1d.
610. Frankfort	½d.	671. Havre.. ..	3d.

No. 672.

Reference to previous Report, Annual Series No. 474.

GREECE.

THE PIRÆUS.

Consul Dupuis to the Marquis of Salisbury.

My Lord,

The Piræus, March 14, 1890.

I HAVE the honour to transmit herewith the Shipping and Trade Returns for 1889, together with a brief Report upon the same.

I have, &c.

(Signed) H. LEWIS DUPUIS.

Trade Report for 1889.

Returns show the value of British trade in 1889 to have amounted to 370,874*l.*, viz., 195,149*l.* in the direct, and 175,725*l.* in the indirect trade, which is an increase of 62,600*l.* above the results attained the preceding year, though only of about 2,000*l.* more than in 1887.

							£
1887	..	..	..	..	..	..	368,453
1888	..	..	..	..	..	..	308,220
1889	..	..	..	..	..	..	370,874

On analysing these results, however, the advantages are not so apparent when it is considered that they are due to an increase in the carrying trade only, and not to any great development of our direct trade with this country. Petroleum from the United States, a government monopoly, and the cattle trade with Russia alone absorb 158,765*l.* After deduction made there remains 212,109*l.* for the direct trade, from which deduction again being made of 116,189*l.* for coal and coke from the United Kingdom, very little is left for value of British manufactured goods imported.

1887.				£			
Direct	..	..	..	72,800	Coke and coal	..	66,053
Indirect	..	..	..	295,653	Petroleum and cattle	..	133,673

6,745*l.* only being left in the one case for British goods introduced, and 161,980*l.* for foreign goods imported in British vessels on the other.

1888.				£			
Direct	..	..	..	156,755	Coke and coal	..	89,455
Indirect	..	..	..	151,465	Petroleum and cattle	..	131,265
(830)							A 2

67,300*l.* for British, and 20,200*l.* for foreign goods introduced in British vessels.

1889.							
£				£			
Direct	..	..	195,149	Coke and coal	..	..	114,147*
Indirect	..	..	175,725	Petroleum and cattle	..	..	158,765

Leaving 90,952*l.* for British, and 16,960*l.* for foreign goods so imported.

The following table will best convey an idea of the nature and extent of our trade, and the movement of British shipping at this port during the past year.

ENTERED.

From	Nature of Cargo.	Vessels.		Value.
		Cargoes.	In Ballast.	
				£
United Kingdom	{ Coals 94,141 tons Coke, 708 " Iron, 498 "	54	..	116,189
" "	{ Partial general cargoes and railway plant	26	..	78,960
Russia	{ Cattle, 2,081 head Sheep, 22,717 " Horses, 48 "	23	..	49,781
Belgium	 Partial general cargoes ..	3	..	7,200
Turkey	 " " " " " " ..	1	..	3,700
United States	 Petroleum, 125,751 cases ..	3	..	108,984
France	 Partial general cargoes ..	1	..	3,300
Egypt	 " " " " " " ..	1	..	2,760
	Entered to repair, or called for coal	5	..	
		117	..	370,874

CLEARED.

To	Vessels.		Remarks.
	Cargo.	In Ballast.	
United Kingdom	11	..	All left with cargo in transit or in bal- last seeking home- ward freights.
Turkey	11	26	
Danubian Ports	17	15	
Russia	1	17	
Holland	4	1	
Belgium	4	..	
Germany	3	..	
Italy	2	1	
France	2	..	
Greek Ports	1	1	
Total	56	61	

* Includes value of some railway plant for the construction of the Piræus-Athena-Larissa Railway.

The demand for coal and coke was greater than during the preceding two years, but it was only due to speculation as to the probable requirements of the numerous vessels of war assembled at the Piræus during the autumn, on the occasion of the marriage of the Crown Prince. British export trade was nil, for although vessels appear in the table as cleared with cargo, it is their original cargoes that is meant, a small part of which only is destined for this port, indeed they might be entered as cleared in ballast, as far as regards the Piræus, for they carry little or nothing away from this place.

Export trade is all carried on under foreign flags with the commercial centres, Marseilles, Trieste, Alexandria, Constantinople, and Italian ports, by regular established lines. In the foreign shipping returns it will be seen that the Danish flag enters into competition this year to the exclusion of the Belgian; this does not affect, however, the trade of the latter, being only due to the circumstance that a Danish company is subsidized by the Belgian Government for the Levant trade.

According to official statements there were 3,168 vessels of all nationalities and denominations, representing an aggregate of 1,478,235 tons that entered, and 3,351 vessels, 1,489,575 tons, that cleared in 1889; this includes small sailing craft.

The total value of imports and exports at the Piræus are given at about—

						£
For imports	..	..	..	..	..	1,379,800
„ exports	..	..	..	..	..	701,990

After deduction made for value of British imports there remains 1,008,930*l.* for the foreign and Greek trade of the place, together with nearly the whole of the exports.

The total value of imports for the whole kingdom in 1889, according to statistics, amounted to 132,653,248 *dr.* against 109,149,182 *dr.* in 1888, and exports amounted to 107,777,808 *dr.* against 95,653,741 *dr.* in 1888, and shows a difference in favour of 1889 of 23,504,066 *dr.* for imports, *i.e.*, 21·5 per cent., and in exports 12,124,067 *dr.*, *i.e.*, 12·7 per cent.

Mean rate of exchange during the year being 30 *dr.* to 50 *dr.* to the 1*l.* sterling.

50 years ago the Piræus was but a small hamlet with some 4,000 inhabitants, mostly settlers from the adjacent islands, who erected their mean dwellings on what are now the quays of Port Draco; these with Peloponnesians and Chiotas, who subsequently settled here, are the immediate fathers of the Piræotes of the present day. Endowed with the spirit of enterprise common to their race they at once understood the advantages of their position as intermediaries. From the propinquity of a court and capital they soon developed commercial relations with centres in Europe, and speedily realised affluence. With it they gradually enlarged their town to the proportions we see at the present day, having now a population of about 36,000 inhabitants. Besides the

Native
industries and
public works.

foreign trade in their hands they have industries of their own, a subject of interest to those who would consult the status of the country, there are many flour mills, cotton and paper factories, iron foundries, saw mills, nail factories, &c., besides carriage and cart builders, chair makers, and other small industries.

Public works. The town now covers the large intervening space to its smaller Port Zea, embanked last year, thus forming a public promenade. It is proposed to dredge this bay in order to relieve Port Draco of its smaller craft. The town also extends far up the slopes of Mount Elias (which might be called the Akro-Piræus) and on to the road to Phaleron, the watering place of the Athenians, with which it will some day unite its houses. There are to be found naval and military schools as well as public schools, hospital, many churches, and a large theatre not yet completed. Besides the embankment alluded to a road is being opened to Phaleron across Mount Elias. The blasting of a sunken rock in the centre of the port, temporarily discontinued during the winter, will be resumed, whereby several feet of water will be added to the depth.

A small wooden pier has been commenced for the use of the Piræus-Athens-Larissa Railway, the construction of which will shortly begin.

A larger supply of water for the town being needed artesian wells have been sunk at Phaleron, from whence it will be conveyed in iron pipes to reservoirs now being built for the purpose.

Corinth Canal. The works of the cutting of the Corinth Canal, which were suspended for want of funds, will probably be resumed by the company that succeeded the Comptoir d'Escompte, to cover the 9,000,000 fr. which had been advanced by the latter when the resources of the original Corinth Canal Company, amounting to about 25,000,000 fr., were exhausted. The advantages of this water way are obvious for coastal navigation, connecting as it would the Ægean Sea with the Adriatic.

LAURIUM.

Vice-Consul Desposito reports favourably on the British trade at Laurium. The value of direct imports he shows to have amounted to 100,768*l.*, whilst that of exports, which far exceeds it, he puts down as 248,470*l.* for the direct, and 208,927*l.* for the indirect trade, exports by far exceeding imports. This is due to the mines and smelting works in the district.

DIRECT IMPORTS.

Articles.	Quantity.	Value.
	Tons.	£
Coal	18,351	} 89,564
Patent fuel	3,989	
Coke	33,195	
Machinery and Sundries ..	..	11,204
Total ..	..	100,768

Note.—Indirect imports nil.

DIRECT EXPORTS.

Articles.	Quantity.	Value.
	Tons.	£
Lead	9,246	184,920
Iron ore	68,555	34,178
Zinc	5,646	28,230
Various	1,924	1,142
Total ..	..	248,470

INDIRECT EXPORTS.

Articles.	Quantity.	Value.
	Tons.	£
Zinc ore	19,833	98,165
Blend	8,939	8,939
Lead (pig)	3,897	78,940
Lead ore	1,465	7,325
Lead smokes	2,137	2,137
Iron ore manufacturing ..	26,843	13,421
Total ..	..	208,927

As Mr. Desposito puts down the total value of the import trade at Laurium in 1889 at 156,771*l.*, there only remains 56,003*l.* for foreign and coastal trade; and for the total value of exports he gives 501,502*l.*, there only leaves 54,105*l.* for foreign trade, these figures clearly show that the trade of the place is all in our hands.

VOLO.

Vice-Consul Merlin's returns for Volo show there were only three British vessels that touched at that port during 1889, and that the value of British imports amounted to 3,710*l.* in the direct trade, whilst exports were nil.

Agriculture.

Agriculture leaves much to be desired, it is presumable aptitudes vary in races as they do in individuals. Eminently as this race is adapted for trade and speculation of all kinds, a disposition is not much manifested for agricultural pursuits in the sense of extended labour on a large scale in the working and sowing of the land. This may be due to its not being sufficiently lucrative, or it may arise in a great measure from the many disadvantages under which it labours, for agriculture on a large scale, and the adoption of modern appliances, is neither understood nor undertaken. The rural districts are thinly populated, whilst the reverse is the case on the sea-board. Proprietors visit their lands only to gather in the fruit crops, which demand little toil and attention. In the more restricted field of market gardening, where it is to be supposed more control can be exercised, to make up for local and other disadvantages, it is but little better; vegetables and fruits are mostly introduced from the islands and the Morea, where either the soil is better than in this province, or the natives more given to the pursuit.

RETURN of British Shipping at the Port of Piræus during the Year 1889.
Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.						Cleared.					
Vessels.			Tonnage.			Vessels.			Tonnage.		
With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.
79	1	80	82,029	650	82,679	1,750	195,149	5	11	14,412	262
						Transit.					

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.										Cleared.									
Vessels.			Tonnage.			Vessels.			To	Vessels.			Tonnage.			Crews.	Value of Cargoes.		
From	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	Crews.	Value of Cargoes.		With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.		Value of Cargoes.		
Bussia ...	24	...	31,531	...	...	31,531	531	£ 49,781	Turkey ...	11	26	37	10,680	25,861	36,541	787	In Transit.		
Belgium ...	3	...	2,632	...	...	2,632	58	3,700	Danube Ports ...	17	17	34	15,439	14,589	23,919	719			
Turkey ...	3	...	2,825	...	...	2,825	58	3,700	Belgium ...	1	17	18	1,331	17,512	18,960	887			
United States ...	3	...	3,721	...	262	3,983	80	108,984	Holland ...	1	1	2	5,454	1,148	6,602	121			
Italy ...	...	...	...	...	954	954	20	...	Belgium ...	4	4	8	5,704	...	5,702	80			
Danube Ports ...	...	...	...	...	1,134	1,134	22	...	Germany ...	3	3	6	4,305	...	4,305	80			
France ...	...	...	...	...	977	977	20	8,300	Italy ...	2	1	3	2,463	1,255	2,718	70			
Egypt ...	1	...	886	...	...	886	...	2,760	France ...	2	2	4	2,934	...	2,934	53			
Total ...	24	3	42,572	2,550	44,922	899	176,725	...	Greek Ports ...	1	1	2	829	987	1,916	41			
			37	42,572	2,550	44,922	899	176,725	Total ...	45	61	106	51,267	61,922	113,189	2,367			

RETURN of British and Foreign Shipping at the Piræus in 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number.	Tons.	Number.	Tons.	Number.	Tons.
British	...	...	117	127,601	117	127,601
Greek*	1,967	77,600	1,189	379,713	3,156	457,313
Austrian	13	2,338	240	261,785	253	264,123
Italian	7	1,984	214	273,410	221	275,394
French	...	...	149	191,820	149	191,820
Turkish	114	11,781	110	103,974	224	115,755
Danish	...	...	17	14,129	17	14,129
Dutch	...	...	31	34,100	31	34,100
Total	1,101	83,703	2,067	1,386,532	3,168	1,470,235

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number.	Tons.	Number.	Tons.	Number.	Tons.
British	...	...	117	127,601	117	127,601
Greek	1,137	70,771	1,179	397,001	2,350	466,771
Austrian	13	2,338	240	261,785	253	264,123
Italian	9	1,884	214	273,410	223	275,294
French	...	...	149	191,820	149	191,820
Turkish	111	10,762	110	103,974	221	114,736
Danish	...	...	17	14,129	17	14,129
Dutch	...	...	31	34,100	31	34,100
Total	1,304	85,755	2,067	1,403,820	3,361	1,489,575

* These figures are given with much reserve, because it is difficult to distinguish between what are sailing vessels and mere sailing boats engaged in the coastal trade.

RETURN of British Shipping at the Port of Laurium in 1889.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.						Cleared.					
Total Number of Vessels.			Total Tonnage.			Total Number of Vessels.			Total Tonnage.		
With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.
36	10	46	33,802	12,206	51,008	60	...	60	62,523	...	62,523
			Value of Cargo.						Total Crews.		
			\$ 100,763						1,806		
									343,470		

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.						Cleared.					
Number of Vessels.			Tonnage.			Number of Vessels.			Tonnage.		
With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.
Countries from whence arrived.			Value of Cargo.			Countries to which departed.			Number of Crews.		
Italy	...	29	...	33,148	33,148	Belgium	...	17	23,055	...	23,055
Egypt	...	8	...	9,551	9,551	Turkey	...	6	4,956	...	4,956
France	...	4	...	4,532	4,532	Holland	...	3	4,673	...	4,673
Greece	...	3	...	3,432	3,432	Roumania	...	2	2,066	...	2,066
Turkey	...	2	...	1,590	1,590	Spain	...	1	1,555	...	1,555
Spain	...	1	...	1,555	1,555	Russia	...	1	1,078	...	1,078
	...	...	...	...	...	France	...	...	837	...	837
Total...	47	47	...	54,148	54,148	Total	...	30	86,120	...	86,120
									733		
									203,927		

RETURN of British Shipping at the Port of Volo for the Year 1889.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.						Cleared.					
Total Number of Vessels.			Total Tonnage (Net).			Total Number of Vessels.			Total Tonnage (Net).		
With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.
2	...	2	1,803	...	1,803	37	£ 1,780	...	...	...	...
											...

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.						Cleared.					
Number of Vessels.			Total Tonnage (Net).			Number of Vessels.			Total Tonnage (Net).		
Country from whence Arrived.	With Cargo.	In Ballast.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	Total.
Belgium...	1	...	1	868	...	868	18	1,930	...	868	1,930
Total...	1	1	1	868	...	868	18	1,930	...	868	1,930

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589. Nagasaki	1d.	647. Taganrog	½d.
590. Hakodate	1d.	648. Baltimore	1½d.
591. Bushire	1d.	649. New Orleans	2d.
592. Chinkiang	½d.	650. New Orleans	1d.
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595. Bangkok	1d.	653. Tripoli	½d.
596. Serajevo	1d.	654. Buenos Ayres	½d.
597. Copenhagen	1½d.	655. Paris	1d.
598. Cephalonia	½d.	656. Cherbourg	1d.
599. Chefoo	½d.	657. Warsaw	½d.
600. Guatemala	1½d.	658. Rome	1½d.
601. Tonga	½d.	659. Saigon	½d.
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604. Vera Cruz	1½d.	662. Galatz	1½d.
605. Christiania	4d.	663. Antwerp	1d.
606. Pernambuco	1½d.	664. Boston	1d.
607. Trieste	1½d.	665. Madeira	½d.
608. Tunis	½d.	666. New Hebrides	½d.
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No. 673.

Reference to previous Report, Annual Series No. 557.

GREECE.

SYRA.

Consul Anderson to the Marquis of Salisbury.

My Lord, Syra, March, 1890.
I HAVE the honour to transmit to your Lordship the enclosed Report on the Trade and Commerce of the Cyclades during the year 1889.

I have, &c.
(Signed) JAMES ANDERSON.

Report on the Trade and Commerce of the Cyclades during the Year 1889.

Compared with the report of the trade and commerce of the district for the year 1888, the return of exports show an increase, whilst the imports are below those of the previous year.

RETURN of all the Shipping at the Port of Syra in the Year 1889. Shipping.

ENTERED.						
Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	173	167,407	173	167,407
Greek	2,493	62,116	835	435,466	3,328	497,582
French	...	...	152	192,196	152	192,196
Turkish	465	9,301	170	100,318	635	110,119
Austrian	2	139	83	86,908	85	87,047
Russian	1	125	27	29,700	28	29,825
German	...	...	10	9,243	10	9,243
Spanish	...	...	1	1,003	1	1,003
Italian	4	585	...	...	4	585
Samiot	39	829	...	...	39	829
Total	3,004	87,595	1,451	1,022,961	4,455	1,096,556
" for the preceding year	3,103	79,069	1,493	1,080,847	4,596	1,159,916

GREECE.

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	173	167,407	173	167,407
Greek	2,614	63,797	841	443,252	3,355	513,049
French	...	...	152	192,916	152	192,916
Turkish	471	9,982	170	100,818	641	110,800
Austrian	2	139	83	86,908	85	87,047
Russian	1	125	27	29,700	28	29,825
German	...	...	10	9,243	10	9,243
Spanish	...	...	1	1,003	1	1,003
Italian	4	585	...	...	4	585
Samiot	39	829	...	...	39	829
Total	8,031	75,457	1,457	1,036,747	4,488	1,112,204
„ for the year preceding	3,148	82,897	1,503	1,097,585	4,651	1,180,482

BRITISH SHIPPING AND NAVIGATION.

The number of British vessels entered and cleared at the port of Syra during the year 1889 was as follows:—

ENTERED.

	Number of Vessels.	Tons.	Crews.	Value of Cargoes.
Direct trade	110	142,322	3,839	} £ 661,748
Indirect trade	63	25,085	1,436	
Total	173	167,407	5,275	661,748
„ for the year preceding ..	168	172,633	5,137	674,521

CLEARED.

	Number of Vessels.	Tons.	Crews.	Value of Cargoes.
Direct trade	98	127,900	3,569	} £ 23,278
Indirect trade	80	39,507	1,706	
Total	178	167,407	5,275	23,278
„ for the year preceding ..	168	172,633	5,137	21,842

Direct trade.

Of the 110 vessels entered with cargoes from Great Britain and the colonies, 98 are steamers which arrived here with general merchandise from London, Liverpool, and Malta, and which, after discharging the portion of their cargo destined for this port, proceeded to other ports of discharge with the remainder; 10 are steamers from Cardiff or Newport with steam coal; and two are steamers belonging to the Eastern Telegraph Company, which called here for submarine telegraph operations.

Of the 93 vessels cleared, 88 are steamers which, although proceeding to Russian and Turkish ports of discharge in order to complete their outward voyage, have nevertheless shipped some goods here destined for England; one is a steamer with a cargo of ore from the coast of Syria, which called for coals and proceeded to Great Britain; two are steamers from Turkish ports, which called here for cargo on their homeward voyage to Great Britain; and two are steamers belonging to the Eastern Telegraph Company.

Of the 63 vessels entered, 47 are steamers belonging to the Asia Minor Steamship Company, which ply regularly between Smyrna, Syra, the Turkish islands, and the coast of Asia Minor, as far as the port of Alexandretta, with cargo, mails, and passengers; two are steamers in ballast, which came to be hauled up on the patent slip; one is a paddle tug-boat, which called for coals; three are steamers which called here for cargo consisting principally of emery stone, valonea, citrons in brine, and sponges; one is a steamer which called for coals; one is a steamer which called here for pilgrims on its way to the island of Tinos; and eight are steamers belonging to the Eastern Telegraph Company, which were engaged on submarine telegraph operations in Greek and Turkish waters.

Of the 80 vessels cleared, 47 are steamers belonging to the Asia Minor Steam Company; two are steamers which returned to their ports of departure in ballast, after having been hauled up on the slip; 11 are steamers which, having arrived from British ports with portions of cargo destined for this place, proceeded to other ports with the remainder, but without taking any cargo from here; 10 are steamers which, having discharged all her cargo, proceeded in ballast to other ports; one is a steamer which called for coals; one is a steamer with pilgrims; and eight are steamers belonging to the Eastern Telegraph Company.

No sailing vessels entered or cleared the port of Syra during the year 1889.

WOODEN Sailing Ships Built at Syra during the Year 1889.

Vessels built
at Syra.

	Number.	Tonnage.	Value.
			£
Under 100 tons	11	528	3,800
Above " "	16	3,952	33,700
Total	27	4,480	37,000
" for the year preceding	26	3,934	30,061

Exports.

RETURN of the Principal Articles of Export from Syra during the Years 1888-89.

Article.	Value.	
	1889.	1888.
	£	£
Tobacco (Greek).. .. .	46,227	31,558
Emery stone	23,040	23,429
Leather and hides	6,500	7,674
Valonea	10,836	4,107
Oil	687	1,847
Hasheesh	576	1,126
Sponges	1,887	1,072
Cheese	1,093	1,066
Marble slates	1,142	803
Olives	282	153
Onions	385	1,228
Fresh vegetables	18,000	15,800
Citrons in brine	4,280	6,500
Other articles	4,111	5,164
Total	118,896	101,027

With the exception of tobacco, which is brought from other ports of Greece for reshipment, and leather, which is manufactured here from foreign hides, all the above articles are the produce of the islands of the Cyclades.

The item "other articles" comprises chiefly merchandise, which, although exported from Syra, is the produce of other countries, and has paid import duty.

There being no export duty, the quantities of the above item are not obtainable from the custom-house returns.

RETURN of the Principal Articles of Import to Syra during the Imports.
Years 1888-89.

Articles.	Value.	
	1889.	1888.
	£	£
Manufactures	404,463	381,201
Hides	199,921	255,082
Grain and flour	146,236	159,684
Salt fish	30,671	39,788
Yarns	45,094	38,222
Iron	32,994	34,438
Lumber	27,871	34,406
Rice	23,819	26,985
Coal	22,870	24,187
Copper	14,936	21,062
Sugar	15,346	19,899
Rope	6,824	12,391
Window glaas	13,882	11,636
Live stock	10,228	10,496
Coffee	9,995	9,206
Tan bark.. .. .	4,570	8,752
Caviar	10,820	8,013
Paper	5,577	7,896
Ready-made clothes	8,120	7,024
Hats	7,924	6,185
Butter	6,322	5,176
Gunpowder	5,609	3,427
Drugs and spices	3,291	2,650
Cheese	1,284	2,410
Tobacco (cigars).. .. .	600	1,145
Petroleum*	..	1,850
Other articles	59,568	69,986
Total	1,123,835	1,203,197

* Being Government monopoly correct quantity or value unobtainable.

The quantities are not obtainable from the custom-house returns.

The currency has been converted into sterling at the rate of 25 new paper drachmas to the 1*l.* sterling.

Of the articles imported the greater proportion is reshipped to the neighbouring islands and other places in Greece and Turkey, the local consumption being very limited.

The average market price of some of the principal articles of Market prices. export and import during the year 1889 was, as far as can be ascertained in the absence of the publication of any price current, as follows :—

GREECE.

EXPORTS.

Articles.	Per	Price.
Leather (Syra manufacture).. ..	Cwt. ..	£ s. d. to £ s. d.
Tobacco (Greek) in leaf	" ..	1 15 0 4 10 0
Citrons in brine	" ..	1 0 0 1 5 0
Valonea	Ton ..	12 0 0 13 10 0
Emery stone	" ..	10 0 0 12 10 0
Olive oil	Gallon ..	0 1 0 0 1 6
Wine	" ..	0 0 6 0 1 0

IMPORTS. (In bond.)

Articles.	Per	Price.	Discount.
		s. d. s. d.	Per cent.
Wheat	Cwt. ..	9 0 to 9 6	4
Barley	" ..	5 0 5 6	4
Sugar	" ..	24 0 25 6	5
Coffee	" ..	70 0 90 0	5
Rice	" ..	12 8 16 0	5
Rum	Gallon ..	1 2 1 3	5
Herrings	Barrel ..	15 0 20 0	..
Codfish	Cwt. ..	16 0 22 0	6
Hides, wet	" ..	40 0 50 0	..
" dry	" ..	80 0 90 0	..
Coal, Welsh	Ton ..	25 0 27 0	..
Iron, pig	Cwt. ..	4 0 5 0	..
" bar	" ..	8 6 10 0	..
" sheet	" ..	10 0 12 0	..
Steel	" ..	16 0 17 6	..
Gunpowder	Barrel ..	9 3 9 9	..
Grey T cloths	24 yards ..	4 0 4 6	6
Cotton prints	Yards ..	0 3 0 4	6
Madapolams	38 yards ..	8 0 12 0	6
Cotton water-twist	10 lbs. ..	5 0 7 0	6

TABLE showing the Total Value of all Articles Exported from Syra and Imported to Syra from and to Foreign Countries during the Years 1888-89. Value of imports and exports.

Country.	Exports.		Imports.	
	1888.	1889.	1888.	1889.
	£	£	£	£
Great Britain and colonies	21,842	23,278	674,521	661,748
Turkey	35,444	33,111	118,900	120,024
Egypt	16,629	23,596	2,914	3,008
Germany	4,000	..	10,420	1,640
Russia	3,930	6,178	133,305	110,164
Holland	3,866	4,000	45,315	18,500
Roumania	3,624	5,219	2,815	1,120
Austria	2,530	3,463	78,125	73,011
Cyprus	2,172	3,480	..	..
France	1,819	7,781	117,940	113,861
Italy	5,085	6,790	14,710	12,880
America	86	..	4,232	7,889
Total	101,027	118,896	1,203,197	1,123,835

The average monthly rate of exchange in 1889 for bills at three months' date on London in new Greek drachmas (paper currency) was as follows:—

Month.	Rate per £ Sterling.
January	31'30 to 31'50
February	31'25 31'30
March	30'50 30'60
April	29'90 31'00
May.. .. .	30'00 30'10
June	30'60 30'80
July.. .. .	30'50 30'65
August	30'85 31'20
September	30'95 31'10
October	30'65 30'80
November	30'50 30'70
December	30'70 31'05

Population of the Cyclades. According to the census taken in April, 1889, the population of the Cyclades was as follows :—

Names of the Islands.				Inhabitants.
Syra	{ Hermopolis (town)	..	..	22,104
	{ rest of island	..	..	9,469
Mykonos	..	..	..	4,525
Zea	..	..	..	3,863
Kythnos	..	..	..	2,781
Seriphos	..	..	..	2,731
Andros	..	..	..	18,148
Tinos	..	..	..	11,442
Naxos	..	..	..	14,572
Paros	..	..	..	7,928
Santorin	..	..	..	17,382
Anaphi	..	..	..	658
Amorgos	..	..	..	4,058
Milos	..	..	..	4,959
Siphnos	..	..	..	3,851
Kimolos	..	..	..	1,315
Polykandros	..	..	..	826
Sikinos	..	..	..	896
Total population				181,508

Custom-house receipts. The receipts at the custom-house and the municipal dues during the year 1889, were respectively 112,411*l.* and 13,025*l.*, and in the year preceding, 1888, 155,929*l.* and 11,722*l.*

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1889.
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GUATEMALA.

REPORT FOR THE YEAR 1888
ON THE
TRADE, COMMERCE, AND INDUSTRIES OF
GUATEMALA.

*Issued during the Recess and Presented to both Houses of Parliament
by Command of Her Majesty.*

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1889.

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GUATEMALA.

GUATEMALA.

Acting Consul-General Hayes Sadler to the Marquis of Salisbury.

My Lord,

Guatemala, July 15, 1889.

I HAVE the honour to transmit, herewith, a Report on the Trade, Commerce, and Industries of the Republic of Guatemala for the year 1888, and to regret that partly owing to illness and partly to delay in the publication of statistics for the year I have been unable to forward it at an earlier date.

I have, &c.

(Signed) J. HAYES SADLER.

*Report on the Trade, Commerce, and Industries of the Republic of Guatemala for the Year 1888.**

Guatemala, the most northern of the central American Republics, comprises about 50,000 square miles, between the latitudes $13^{\circ} 42'$ and $17^{\circ} 49'$ north, and the longitudes $88^{\circ} 10'$ and $92^{\circ} 30'$ west; it is open to the Atlantic on the east, and the Pacific on the south-west, while on the land side it is bounded on the south-east by the Republics of Honduras and Salvador, and on the north and west by Mexico, touching on the north-east with the colony of British Honduras for a distance of about 70 miles. It is divided into 22 departments, of which the largest and most northern, Peten, is almost wholly unexplored, contains impenetrable forests, and is mostly inhabited by wild and independent tribes of indians, who having no acquaintance with civilization, nor seeking it, often show a dangerous tendency and resent intrusion. The greater part of the adjoining large departments of Alta Verapaz and Huehuetenango are but little known, and there are other departments but imperfectly opened out. The development of the country is chiefly confined to the southern and western parts, and here the population is the most dense and civilization the most extended.

Though the flat lands near the coast are hot and unhealthy, the climate in the interior, considering that it is within the tropics,

Throughout this report exchange is calculated at the rate of 6 dol. 50 c. per £1. sterling.

(741)

A 2

is not insalubrious, on account of the extremely mountainous character of the country. The city of Guatemala, however, notwithstanding its situation in a favoured district nearly 5,000 ft. above sea level, is far from healthy, and fevers and other maladies are prevalent, especially towards the end of the dry season, and during the first rains, until heavy falls have in a measure cleansed the city, owing to the want of a sufficient supply of water and to the very imperfect condition of the drains, which, being open to every house without traps, are a constant and insidious source of danger. The temperature is fairly equable all the year round, varying in range according to elevation; in the low lands the thermometer rarely falls below 70° at night, or rises above 90° in the daytime; on the plateaux, though the midday sun has great power, the range from 60° to 80° is rarely exceeded, and on the tops of some of the volcanoes dew freezes and forms ice in the dry winters. The seasons are practically divided into wet and dry; rain commences to fall in April, gradually increasing in persistency and volume till October, from the end of which month till the next wet season commences scarcely any rain whatever falls. The rainy season is tempered by almost daily sunshine for a few hours, the mornings being generally fine, a condition highly favourable for the growth of all vegetation, but towards the end of the dry season everything is burnt up, the ground becomes hard, the lack of moisture is sometimes a serious drawback to agriculturists, and the absence of vegetation not an unfrequent danger to cattle. April and May are the hottest months, and December and January the coldest. The average rain during the year is a fraction over 53 inches.

The total population of the Republic is stated to be 1,427,116, and to have increased by 148,505 in the last five years. This calculation is based on the returns of births and deaths, and is not entirely to be depended on. In some districts the number of births has been returned as double that of deaths, and in one instance four times, partly from a careless system of registration, but chiefly from a remote custom among the Indians of not burying their dead in the cemeteries or places set apart in each hamlet for that purpose, so that in out-of-the-way places, often at a great distance, deaths not infrequently occur without coming to the knowledge of the authorities, only those occurring in or near the villages being entered in the civil registers. In the same manner the births which occur among that portion of the population in distant parts are sometimes not registered for many months after the eight days fixed by law. The births in 1888 are given as 60,214, or 1 in 23 of the population, and the deaths as 27,331, or 1 in 51. The marriages in the same year amounted to 5,028, or 1 in 277 of the population; they are more frequent among the Indians than the Ladinos, the former being exceedingly moral in their habits, and generally marrying at a very early age. About 60 per cent. or more of the entire population are pure Indians, the remainder being composed of Ladinos, or half caste, some of whom have but little, if any, mixture of white blood, with com-

paratively a small number of pure descendants from Spanish invaders or settlers. There is a well-defined distinction in habits, character, and customs, marked by a certain jealous pride, between the two classes. The population of the capital, which in 1881 amounted to 57,928, is now estimated at 65,796, the increase of 7,868 arising partly from natural causes and partly from the attractions afforded by the city to families from other departments. Next in point of size comes Quezaltenango, with 20,000 inhabitants, and Chimaltenango, and Antigua, Guatemala, with about 14,000 each; the latter city was formerly the capital till destroyed by earthquake a hundred years ago. The city of Guatemala is traversed by tram-cars; it is lit with electric light, as well as one or two other cities, gas not being made in the Republic, and a contract has been entered into for the purpose of lighting the port of San José in a similar manner.

Of the capital.

The country is eminently volcanic, and earthquakes are of common occurrence. Besides others, varying from 3,000 to 10,000 feet, there are five volcanoes over 10,000 feet high, the most lofty, that of Acatenango, exceeding 13,000 feet. It is well watered by numerous rivers and mountain streams, but the configuration of the country is such that in many parts water in the dry season is scarce, sometimes for drinking purposes unobtainable, and this question, together with those of means of communication and the possibility of obtaining labour, is one of first consideration to farmers and settlers. The existing roads and tracks, of which further mention is made, afford but an imperfect measure of inter-communication from the extremely mountainous character of the interior, with here and there elevated plateaux cut up by deep barrancas, or precipitous gullies, many hundred feet deep, which are a remarkable characteristic of the country, and this weak point undoubtedly forms a serious check at present to the development of those rich resources which the soil and climate would warrant, while hands for agricultural purposes are scarce, from an unwillingness on the part of the Indian population to engage their services in labour.

Configuration of the country.

The soil in general is exceedingly fertile, rich in decayed tropical vegetation, and suitable, from the great variety of elevation, to the natural productions of every zone, but, though highly endowed by nature, more than half the country remains uncultivated. All cereals, vegetables, and known fruits are produced, while, except for the purposes only of obtaining abundant forage or some special vegetable, improvement of the land and manuring is unnecessary, and never resorted to. The poor man has but to scratch the soil sufficiently deep for sowing to ensure a crop, or to cultivate his garden stuff; those who have capital or a special industry can employ it with profit, and plantations of coffee and some of the richer products of the land are undeniably lucrative.

Soil.

The chief agricultural products, which are capable of much wider extension, amount, on an annual average, to about 50,000,000 lbs. of coffee; 3,000,000 lbs. of white, and 8,000,000 lbs. of

Products.

brown sugar; 200,000,000 lbs. of maize; 8,000,000 lbs. of potatoes; 40,000,000 lbs. of wheat; 4,000,000 lbs. of rice; 400,000 lbs. of cacao; 600,000 lbs. of cotton; 600,000 lbs. of beans, oats, and barley; 800,000 lbs. of tobacco; 250,000 lbs. of sarsaparilla; 125,000 lbs. of broad beans; 40,000 lbs. of indigo; 60,000 lbs. of rubber; 50,000 lbs. of pepper; about 1,000,000 bunches of bananas; and nearly 500,000 cocoanuts. Besides these, the vegetable products include annotta, balsam, castor-oil, sarsaparilla, ramié, vanilla; and there is an endless variety of fruits, some almost unknown elsewhere, which form, with the patches of maize and beans they grow, the chief subsistence of the Indian population. Of these numerous fruits, the alligator pear, custard apple, mango, papaw apple abound; lemons, lime, oranges, pine-apple, bananas, so valued in Europe, are in great abundance; and strawberries, apples, peaches, and other fruit of a colder zone, are cultivated on the higher levels to a small extent.

Fruits.

Ports.

There are no harbours whatever on the Pacific side, the three ports of San José, Champerico, and Ocos are simply landing places on an open coast, an iron pier being thrown out, and vessels lay at anchor in the swell some 500 yards further out. Merchandise is landed and conveyed on board in lighters, and passengers are hoisted from these lighters on to the pier in cages, and on board in barrels. The port of San José communicates with the capital, and that of Champerico with Retalhuleu, by rail; the small landing place of Ocos, about 5 miles from the Mexican frontier, has been lately opened as an outlet for the coffee produced up country, the pier having been erected about a year ago. On the Atlantic side is the port of Livingston, and, it is said, a new port, called Port Barrios, will shortly be opened, intended for the terminus of the railroad, should one be made, between Guatemala and the Atlantic. Livingston was declared a free port for ten years, commencing from January 1st, 1883, with a free zone of some miles round.

Shipping.

Except in the increased number of vessels touching at Ocos, no remarkable change has taken place of late years in the shipping visiting the ports of the Republic. The shipping entered at the port of San José in 1888 consisted of 116 steamers and 16 sailing vessels; the steamers were those of the Pacific Mail Company, which trade regularly between San Francisco and Panama, with the exception of seven German, three Mexican, and one Spanish vessel; the sailing vessels were of American and German nationality, except one British and one Norwegian. The port of Champerico was visited by 97 steamers and seven sailing vessels, and that of Ocos by 29 steamers and three sailing vessels. Of the 77 steamers and 11 sailing vessels which visited Livingston, 19 steamers and eight sailing vessels were British, the remainder American.

Railroads.

The only railroads at present in the Republic are those above-mentioned. The single narrow guage line from San José to Guatemala, 72 miles long, was built by American enterprise, and

is almost entirely owned in the United States. Considerable work has been carried on during the last year in altering the course of that part of the road between Escuintla and Palin, where the grade is very steep, and ascends the shoulder of the Agua volcano; the grade will, by taking a more winding course, be greatly reduced, and, when completed, more facility will be given to the running of trains, though the mileage will be increased by about four miles. The rise is but slight from San José as far as Escuintla, when it rapidly increases till the plateau of the capital is reached, nearly 4,900 feet above sea level. There is one train daily each way, and another by which the night is passed half-way at Escuintla. The single line from Champerico to Retalhuleu is 27 miles long, rising gradually with no steep grade to the height of 1,000 feet, and is the outlet for the produce of the extensive coffee plantations on the foot hills in the neighbourhood, which is brought down to the terminus on mule back. Retalhuleu receives additional importance from being only one long day's journey from Quezaltenango, the most populous city in the Republic next to Guatemala. This line was also built by American enterprise, and till quite lately almost exclusively held in the United States, but in April, this year, the great majority of shares were purchased by a native syndicate, and the management now passes into their hands, though there may be some difficulty in transferring the head office from San Francisco.

The new port of Ocos is likewise desirous of having a railway into the interior to bring down the coffee grown to the north and west of the Retalhuleu district, but a difficulty exists, which is not yet solved, in the terms of the Champerico railroad concession, whereby no line, it appears, can be built by another company within a certain number of leagues of that railway. The prospect of a line from the capital to Antigua has vanished for the present, though the time for executing the work was extended, the contractor has failed to carry out his contract which has consequently lapsed. An agreement entered into with a French contractor for the purpose of constructing a line from Guatemala to the Atlantic, called the "Ferro Carril del Norte," or northern railway, has not met with the approval of Congress. This line, which was to terminate at Port Barrios, would be of immense advantage to the country, and, it is hoped, will some day be carried out when an acceptable proposition is offered. It would open out the country between the city and the Atlantic, which would thus be joined with the Pacific, and shorten the journey across from the capital by five days, a journey which at present is only accomplished on mule back by a difficult track, rendered almost impassable during the season of heavy rain, and along which the light mails to the United States and Europe are now carried.

A good deal of attention is paid to the few public roads, as well as to the cart and mule tracks, in keeping them in repair and building bridges, and a few miles of new road are each year opened for traffic. The torrential rains, however, in the wet season do an immense amount of damage, often turning them into

water-courses and rendering them impassable, so that much work is yearly required to restore communication. The old road from Guatemala to the port of San José is well kept, but little used since the railway was opened.

There is a good road to Antigua, the most frequented in the country, and half way between the capital and that city a carriage road branches off to Chimaltenango, Tecpan, Totonicapan, and Quezaltenango. It takes five hours by stage to Antigua, and three days to Quezaltenango. There is also a carriage road some part of the way leading to the Republic of Salvador. A road is in course of construction from the capital to St. Juan de Sacatepéquez, and others commenced in the direction of Zalapa and Salamá. North and east of the city there are as yet no roads except for about five miles out of the capital, mule tracks supplying the only means of communication. A new road has lately been opened for carriage traffic from Palin to Antigua; and two short roads from Amatitlan to San Vincente, and from Belén towards the department of Santa Rosa, are being constructed for the purpose of placing the coffee plantations in better correspondence with the railway. There is also a cart track from Escuintla in the direction of Santa Rosa, and a road is commenced from Mazagua, still lower down on the railway towards Patulul, from which place the old road to Santa Lucia has been repaired. From Quezaltenango the cart road to Costa Cuca has been repaired, and the track to San Marcos improved, while some work has been done towards a road from the latter place to the new port of Ocos. Besides the above there are a few miles here and there of so-called roads and cart tracks in different parts of the country; but all goods, traffic, and land carriage where the two railroads do not touch, as well as all travelling in the interior, except where the roads above-mentioned allow of conveyance on wheels, are done on mule back, horses being also used to a less extent for the same purposes, and in many distant parts these mule tracks are difficult and dangerously cut up in the rainy season.

Post and
telegraph.

The postal arrangements made eighteen months ago for the conveyance of mails via Livingston to New York (thence to Europe and New Orleans), are regularly carried out, and have proved of great benefit to commerce and agriculture, though second class matter is still forwarded by the Panama route. The aggregate of matter circulated in the Republic in 1888 amounted to 5,101,880 pieces, namely, 2,764,889 sent and 2,336,453 received, being an increase on that of the preceding year of 577,957 pieces. The chief increase in correspondence is with the United States, France, and Germany, besides the neighbouring Republics of Salvador and Nicaragua. The number of post offices in the Republic is 157. There are 1,923 miles of telegraph and 93 offices, chiefly in the south and west, 75½ miles having been added in 1888. The number of messages increased from 390,554 in 1887 to 457,009 in 1888. There is direct communication with Mexico, Salvador, and Honduras, and from the Pacific to the Atlantic. In February this year a Government contract

was made with Señor Cuenta Cruz for the establishment of a cable line from the east coast to the Antilles, which will put the country in more direct communication with the United States, South America, and Europe.

Very little has been done in the way of public works beyond the roads and bridges, building a few school houses and prisons, and laying out a public park in one or two of the cities. The most useful are the works carried on in different parts of the country for the better supply of water, and for furnishing the inhabitants of villages with public fountains and drinkable water. Money has been raised for this purpose in the city not before it is needed, and it has been decided to build a national palace to meet the growing necessities of public administration. A quay has been constructed at Livingston, a barrack and prison at Quiché, a municipal palace at Quezaltenango, and a national palace at Coban. The public works for the projected canal in the department of Santa Rosa have been stopped from want of proper dredges and machinery, and a contract made which includes its construction.

REVENUE AND FINANCE.

The total revenue in 1888 showed an increase of 58,751*l.* over that of the preceding year, and amounted to 769,919*l.*, derived as follows:—

	£
Imports	351,830
Exports	56,369
Spirits, tobacco, &c. ..	233,763
Contributions (stamps, roads, land, &c.) ..	52,224
Imposts on flour, salt, and cattle ..	32,512
Miscellaneous, including post and telegraph	43,221
	769,919

And, after deducting general expenses, the net product amounted to 704,656*l.* There was a deficit of 12,509*l.* in the post and telegraph. The expenses of the country for the year 1888 are thus estimated:—

	£
Legislative	6,434
Executive	4,249
Judicial	19,809
Department of Government and Justice ..	68,538
" Foreign Affairs	23,769
" Public Works	88,348
" Treasury and Public Credit ..	206,489
" Public Instruction	108,088
" War	178,492
	704,216

Owing, it is stated, to there being much to be desired in the system of collecting the taxes, the revenue last year did not come up to expectations, and in the one instance of military contribu-

tions the amount received barely exceeded one-thirteenth of the sum calculated. The import duties are the most important item of revenue, and in this department some reforms have been considered desirable with regard to the entry of merchandize; a new system of registering the class, weight, and value of imports, which were formerly taken from the ship's manifest, is now in practice, and, it is believed, the customs statistics will in future be of greater value, and contain details necessary for a truer knowledge of their movement, as well as that of the exports. The revenue from liquors increased in 1888 by 15,388*l.*, principally owing to the centralisation of distilleries. As many goods have been imported into the country without the consular certificate required by law, a fine of 10 per cent. is now levied on the value of all merchandise entering without such certificate.

Finance.

The total debt of Guatemala is stated to be 13,094,944 *dol.* as follows:—

					Dol.
Consolidated	..	..	..	..	6,143,010
Not consolidated	..	..	..	..	2,338,345
Foreign debt	..	..	..	..	4,613,500

But the Foreign debt, which amounts to 922,700*l.*, is here calculated at par, or 5 *dol.* per *l.*, and taking the total debt at an average exchange of 6 *dol.* 50 c. per *l.*, it would stand thus:—

					£
Interior debt (consolidated)	..	..	..	..	945,093
Floating debt (not consolidated)	..	..	..	..	359,745
Foreign debt	..	..	..	..	922,700
Total	..	..	..	..	2,227,538

Floating
debt.

The Floating debt appears to have sprung up since the consolidation of the Interior debt two years ago, and to have increased by 137,552*l.* in 1888, which is attributed as follows:—

					£
To extraordinary expenses in the different departments of the					
Government	..	..	..	..	85,287
National building at San José	..	..	..	..	8,896
Custom-house at Retalhuleu	..	..	..	..	7,615
Increase in liquidating the English debt	..	..	..	..	11,083
Payment of Guatemala Gas Company's claim	..	..	..	..	6,923
Interest and bonification of the debt	..	..	..	..	34,010
					153,814
From which are deducted certain payments which figure in					
the administrative departments	..	..	..	..	16,262
					137,552

New issue of
paper money.

To meet this increase in the Floating debt the executive resolved to issue legal tender notes to the amount of 153,846*l.*, but the plan was not at once carried out, and many capitalists of the city petitioned against it. The question of dealing with the Floating debt was eventually left by Congress to the decision of the executive, and by decree of June 27, the above sum is to be

issued in paper money, and all taxes and duties are to be paid in such notes, except such portion of the customs dues as are payable to the Committee to be applied to the service of the Interior and Foreign debt which are to be paid in silver. The bonds of the Interior debt are now almost entirely held in England, large transfers having been lately made; about a year and a-half ago these bonds could be bought at 30*l.*, they now fetch 85*l.* or 90*l.*, the interest on the Foreign and Interior debt having been punctually paid since payment was resumed on the Foreign about two years ago, and both are quoted on the London market where the interest is payable.

Interior
bonds.

Owing to these purchases, and the unusually high price of coffee, money is plentiful, and there has been a consequent rise in the value of property, land as well as city property having increased about double in price in the last two or three years. There is even difficulty found in the employment of capital; and interest has fallen from 10 to 12 per cent., at which it stood three years ago, to about 6 per cent. Silver is plentiful in the country, and gold scarce; silver being the standard currency is drawn into the country, and continues to be imported, more than 200,000*l.* having arrived at the Pacific ports during the first few months of the current year, but the supply of gold is regulated by a small demand for travellers. With reference to the subject of bimetallism, it has been suggested that it might be advisable for Congress to take into consideration the question of fixing the value at which foreign gold should be legal tender. The average rate of exchange on London during the year 1888 was 6·36½ *dol.* per 1*l.* sterling; it is now 6·65 *dol.*

Monetary
condition.

It is proposed to issue a municipal loan of 307,692*l.* in bonds bearing 6 per cent. interest, to be issued at 85*l.*, for the purposes of a further supply of water for the city, constructing new markets and erecting buildings on municipal property. The first issue of 15,385*l.* for the water supply has been taken up.

INDUSTRIES.

Attention being almost exclusively paid to agriculture, the industries of the country are quite in their infancy, though many of the requisite materials are plentifully at hand. Among the principal industries may be mentioned the spinning and weaving manufactories of Cautel, belonging to the Señores Sanchez, the manufacture of furniture at Antigua, and a few others of cigars and cigarettes, woollen, cotton, and silk textures, shoes, soap and candles, tanned leather, and spirits. The natives make various materials of wool and cotton, shawls of silk and cotton, hammocks of aloe, hats, baskets, mats, earthenware and crockery, images and trinkets of wood and pottery, leathern articles and saddlery, bed covers, napkins, table cloths, aprons, &c. The picturesque costumes of the Indian population, and much that is worn by the Ladinos are woven in the country in hand looms from imported thread tinted with native dyes, and this industry forms a considerable source of employment for women. Quezaltenango is a

Manufactures.

great centre of this industry, but each village has a separate and distinctive pattern, embroidered or woven, of upper garment or jacket (guipil) peculiar to its inhabitants, which they make themselves only in their villages, and in some instances cannot be induced to reproduce except for their own use. These patterns, especially among the women, are guarded as jealously as the Scotch tartan used to be. There is but little energy displayed in the development of any of the industries of the country, which is greatly dependent on foreign goods and manufactures, which are sold at extravagant prices.

AGRICULTURE.

Agriculture
in general.

Agriculture, which is the most important resource of the country, and affords the means of livelihood to the majority of the population, has a considerable impulse of late years from the support given by the Government in facilitating the acquisition of land, and in assisting the farmer with labourers when in want of hands. A commission of agriculturists was appointed last year for the purpose of making experiments and rendering advice; and agricultural councils have been instituted in the different departments by order of the Minister of Public Works. The richness of the soil and the varied climate are sufficient to give intelligent agriculturists in every branch the chance of a profitable result, and though no statistics are available in furtherance of proof as to the real extent of the area of land under cultivation, the produce of the country has greatly increased of late years. The high price of coffee this year has furnished an additional stimulus; profits in that branch of culture having been extremely large, and land has enormously risen in value. A great deal, however, has to be done with reference to the roads of communication, especially in the outlying districts, before a fair chance is given to the full development of the different products of the country.

Farm labour.

One of the great difficulties is that of procuring voluntary labour, and it is often not obtainable to a sufficient extent, though at each finca, or farm, of any size there is a man solely employed going about the villages among the Indians to get hands. The Indians are hardy and strong, though small in stature, and capable of any amount of fatigue, but are unwilling to go out to work, wages and money seeming to offer them little inducement. Many of them have their 30 or 40 rods, their plot of maize, and often keep two or three sheep, or their pigs and fowls which they sell, but have no ambition or sense of accumulation. Living costs them little, and they are satisfied to pass away existence content with the small quantity of cereals they cultivate, and the profusion of fruit which nature provides for them and their families. When they engage on a farm it is generally for a month, when they return to their villages, and little dependence can be placed on their continued assistance. A fresh gang will perhaps replace them; they will often be engaged from a great distance, and starting before sunrise the men as well as the women and young girls will walk thirty miles or more to the plantation, carrying on

The Indians.

their heads their food for the time engaged, and arriving perhaps about 11 o'clock will work the rest of the day in the sun. Fatigue seems unknown, and the weight the men are capable of carrying is not perhaps exceeded by the natives of any part of the world. Wages vary from 1s. 1d. to 1s. 6d. in the coffee plantations and farms, but a great deal of labour is done by piece-work, when more is gained, and a higher rate is generally given for other employments. Some farmers find it advantageous to offer much higher wages with a view to inducing the hands to remain, and as labour is a principal factor in the agricultural question some cultivators endeavour to anticipate their wants by training young hands, or seeking them beforehand in neighbouring departments, but those who have not this forethought, or trust to their requisitions on the Government, are often disappointed. Assistance at harvest time is given as far as possible in sending to the different farmers at their request such men as are obliged by law to work on the roads, excusing them from that obligation, for which payment is fixed at 1s. 2d. per day, but the many demands can be but imperfectly met. Many of these men are sent from one department to another, and are also employed in destroying the locusts, which have been such a plague to agriculturalists, but is now said to be disappearing from many parts of the country owing to the measures taken. In the uncultivated districts many Indians refuse to work or lend their assistance, they have an antipathy to progress, are neither producers nor consumers, and would be more like exotic plants were not some measures used to make them useful members by forcing on them services which lead to civilisation. In general these men are paid in advance, but if they run away from the farms they are put in prison till they complete the work due to the farmer or refund the money.

Government
aid.

Agricultural land has doubled in value in the last two and trebled in the last four years, while property generally has largely increased in price. A finca, or farm, say of 100 acres, well situated at a good elevation of about 3,000 feet above sea level, will now fetch about 2,200*l.*, whereas four years ago it might have probably been purchased for about 700*l.* It is uncommon to find much land for sale here, when prices are low and something like a rush to purchase then prices go up.

Value of land.

Coffee is the most important agricultural product, and from its excellent quality fetches a high price in the market. The area of land planted has possibly doubled in the last few years, and owing to failure in the last year's crop in Brazil and the consequent rise in the value of the product, an unusually large acreage of fresh land is now being planted, and greater care taken with the present estates, many old plantations being renewed and added to. It is expected that next year, or the year after, 1,000,000 quintals will be produced, bringing, exclusive of consumption, a wealth of 2,300,000*l.* to 2,500,000*l.* to the country. It is said that this year's exports will largely exceed those of 1888, though 100,000 quintals are supposed to have been lost from want of hands to gather the grain. There is still a quantity of good land available

Coffee.

for purchase. Sowing is generally done in June, and when about 7 inches high the young plants are transplanted into nurseries, watered in the dry season and protected from the sun until ready to be planted out. About 100,000 quintals of coffee are yearly consumed in the country.

Sugar.

Sugar takes the next place amongst agricultural products, from the extent of acreage planted, and the cost of machinery used. The price has greatly risen, and mill owners are beginning to export a considerable quantity along the coast, but scarcely with the profit expected, and measures are in course of preparation with a view to the more lucrative outlet of this commodity.

Cacao.

The cacao grown is of superior quality, and at one time it was an important article of export, but has of late years greatly fallen off, and at the present time only about 400,000 lbs. are produced, scarcely more than required for interior consumption. The Government are encouraging farmers to turn their attention to this branch of agriculture, and some new plantations have been made; the bean, in considerable quantity, has been distributed in various parts of the south, the sowing has shown good results, and it is expected that the cultivation of this valuable plant will be much increased. It takes about six years from the time the seed is sown before a crop is produced, but after that period each shrub will yield 1 lb. three times a year, and last for 100 years. There is little cost in cultivating or gathering, no machinery is required, so that, though there is some time to wait before new plantations give any return, the ultimate profit is considerable. A slightly earlier result may be obtained by surrounding the plantation with lime or orange trees, well-preparing the land, and shading the plants with suitable trees.

Wheat.

Wheat is grown in many parts of the Republic, but not in sufficient quantity for consumption, about 22,000 sacks of flour and 6,000 bushels of wheat being annually imported from the United States. It is of excellent quality, and probably its cultivation would be carried on to a greater extent but for a certain monopoly established at the flour mills, which has reduced profits. To meet this the Government have granted a subvention to two mills, one in the department of Santa Rosa, the other at Tecpan, in that of Chimaltenango, and are about to establish mills in each of the departments of Jalapa and Chiquimula, where good wheat is grown, though at present in small quantity. Good seed obtained from other countries is distributed gratis; 320 bushels of wheat from Chile has been further ordered for this purpose, and suitable land offered at a low price, in many cases gratuitously, to cultivators.

Coca.

A quantity of coca seed was last year imported from Peru, for distribution among the people in a suitable zone for its growth; but the result was unsatisfactory, from the bad quality of the seed, and fresh means are being taken to extend the cultivation of this plant.

Pepper.
Cinnamon.

Pepper and cinnamon are grown in the department of Alta

Verapaz; good seed has been imported from Ceylon, and planting is extending in that fertile district, while good results have been obtained in the department of Escuintla where a few plantations have been made.

Rice is a great article of consumption in the Republic, and more than 40,000 quintals are annually grown in the east and south, where the land is favourable. Some animation is shown at Chiquimulillo, one of the centres of production, owing to a canal being made to the port of San José, and to the fact that the Government have there established works for perfecting machinery to separate the husk. Rice.

Good tobacco is grown, but little attention paid to the mode of preparing it; the production is being encouraged by the circulation gratis of the best seed procurable from Havana, the United States, and Sumatra, and many new plantations are being made. Tobacco.

In spite of endeavours made to protect the trees, the production of rubber decreases, and only in Verapaz and Peten are trees found in any quantity, while agriculturists show no signs of replacing those that are worn out. Holes are made in the stems to extract the sap, and alum, saltwort, or some other juice used to coagulate it; but it might be a profitable industry, if proper knowledge and appliances were brought to bear. A few new plantations are being made in one or two low-lying farms. About 3,000 quintals are annually exported. Rubber.

The vine has scarcely been tried in the country, but it is said that the soil and climate in most of the departments is favourable for its growth. A contract has been made for preparing land as a nursery for 10,000 stocks, which have been sent for by the Government from Andalusia in Spain, together with other fruit trees, amongst which will be a quantity of olives, which ought to do well, and give an impulse to agriculture by the introduction of fresh matter for enterprise. Vine.

Maize is grown everywhere; beans, peas, and potatoes generally in sufficient quantity for consumption. Oats have lately been grown to a small extent, but are simply cut, dried, and packed, and given to the cattle as forage. Sarsaparilla and vanilla grow wild on the mountains all over the country; the price of sarsaparilla has greatly fallen, there was scarcely any exported last year, and only to the value of 1,621*l.* in 1887. The quality of the vanilla is good, but though it figures as an export it is not cultivated for that purpose. Banana planting in the east is occupying much attention as a profitable industry, some 200,000 trees being now yearly planted, for the supply of the United States market. About 120,000 bushes are at present exported annually. Peruvian bark has proved a failure, and the cost of introducing the tree has been practically lost. Ramié was also introduced three years ago, and more than 600,000 shoots were distributed with a view to its general cultivation, but exportation of the fibre has not met with satisfactory results. Indigo works are subsiding in the country, though a few still exist in the east, and Other crops.
Sarsaparilla.
Vanilla.
Banana.
Peruvian bark.
Ramié.
Indigo.

Cochenille. means are being taken to encourage them; it was only exported to the value of 93*l.* in 1888. The industry in cochenille has almost entirely disappeared. For thirty years it was the principal article of export, and now the little produced is used for native consumption, aniline dyes having ruined the trade.

Inducements to cultivators. It will be seen that some encouragement is given to agriculture; the following premiums and inducements are held out to cultivators of certain crops. Anyone desirous of cultivating sarsaparilla, rubber or cacao, and not having land for the purpose, can, on requisition, be put in possession of a suitable lot of more or less extent by the head of a department. If it is desired to form a ranch on waste land in the department of Isabel, or between Coban and Flores, or north of the River Motagua, or in the departments of Zacapa and Alta Verapaz, possession of land can be obtained with consent of the Government. The following rewards are offered to agriculturists who at the end of eight years can show healthy plantations of chinchona of a certain sort (*calisaya* or *succirubra*): 154*l.* for 1,000 plants in place eight years old for the first cultivator, 77*l.* to the second, 36*l.* 10*s.* to the third, and 15*l.* 10*s.* to all others. A lot not less than two acres, nor more than 120 acres (a caballeria), of national land will be conceded to growers of bananas in the departments of Zacapa, Isabal, and Alta Verapaz, being the same limit which is fixed for land granted to wheat growers. A premium of 4*l.* for a term of three years is given for every 150 lbs. of indigo grown and made in the country, and at the end of ten years after commencing the cultivation a reward of 11*l.* 10*s.* for every thousand gum trees planted out, of five years old.

CATTLE.

Number of animals. Cattle are fairly abundant for the requisites of the country, but not for exportation, as in the neighbouring Republic of Honduras. According to the last census there are in the Republic: 114,780 calves, 31,566 bulls, 55,536 bullocks, 49,061 oxen, 246,187 cows, 21,053 foals, 47,481 mares, 49,346 horses, 9,354 young and 33,427 full-grown mules, 46,426 sheep, 30,370 goats, and 194,776 pigs.

Cattle. Though the rearing of cattle is very remunerative, it is chiefly carried on at the several farms and plantations, and but little resorted to as a special business, there being few, if any, large ranches held solely for that particular purpose. There are, however, many rich breeders of cattle, who, in like manner with many large plantation owners, live in the city, leaving their estates under the care of a manager, and some capitalists buy lean cattle at the different fairs at a low figure, and send them to pastures on the coast, or other places, where they are looked after for 15*s.* 6*d.* a head, and at the end of a year are worth double the price given. The breed has in some measure been improved by imported stock. A calf is worth from 25*s.* to 45*s.*, a bull from 60*s.* to 90*s.*, an ox from 80*s.* to 150*s.*, and a cow from 45*s.* to 90*s.*; but prices vary

considerably, according to grade, and a cow which gives a great deal of milk may fetch as high as 11*l*. The consumption of beef does not exceed 33 lbs. a year per head of the population. Draught work is done by oxen, but the most a yoke can draw in the heavy carts is about 15 cwt., and that at a very slow pace, where there are tracks to admit of such communication, so that their usefulness is greatly confined to farm employment. There are abundant natural grasses in almost every part of the country for the nourishment of cattle, and near the towns the nutritious sacate, a bunch grass growing five feet high, is cultivated, and proves very profitable. This grass can be cut four times a year, and need not be re-sown for many years. Towards the end of the dry winter, however, when but little rain has fallen in the preceding wet season, as was the case last year, forage is short, particularly on some of the plateau, and cattle, fed chiefly on the tops of the sugar cane, or any dry food they can find, become emaciated, no provision being made by cutting and hoarding for such eventuality. Grasses.

The mules, as well as the native horses, are small but very enduring animals, capable of carrying heavy weights for great distances, 300 lbs. being an ordinary load. A brood mare or ass is worth from 5*l*. to 15*l*., a young mule from 5*l*. to 10*l*., while a quiet sure-footed mule for riding purposes will fetch from 12*l*. to 60*l*. A young horse of the country fetches from 7*l*. to 15*l*., and trained for the saddle up to 40*l*., but everything depends on their quality, as horses and mules may be bought as low as 3*l*. Horses and mules.

The sheep are diminutive. There are some large flocks, but they are chiefly kept in small numbers by the native population. They seem to have been originally of a larger breed, and owing to the want of crossing to have degenerated. The wool, from the lack of washing and keeping the sheep clean is not of good quality, while as a question of food the mutton is inferior. A sheep is rarely worth more than 9*s*., its value varying generally, as well as that of goats, from 3*s*. to 9*s*. Pigs and fowls pay well, as they cost practically nothing to rear, seeking for themselves the food they require which nature amply provides. Sheep.

MINES.

The mineral products are represented by gold, silver, lead, iron, copper, antimony, coal, loadstone, quicksilver, marble, conglomerate, lithographic stone, obsidian, alum, alumina, porphyry, pumice stone, chloride of soda, sulphur, carbonate of lime, mica, talc, silicate, clay, salt, amianthus, zinc, saltpetre, and gypsum. Gold is found in the beds of most of the rivers, particularly the Motagua, and is worked in the department of Isabal to some extent. A few silver mines are also at work, and about 20,000 ozs. from the mines of Messrs. Conde and Co. have been coined at a mint established 18 months ago. About 3,570 tons of salt are annually produced, partly from mines in the departments of Alta Verapaz and Quiché, and partly on the south coast, Mineral resources.

Products.

for home consumption, and a small quantity is imported; the price is about 9s. 3d. per 100 lbs. The annual production of saltpetre from the mines of Zacapa and Sacatepéquez varies from 15,000 lbs. to 20,000 lbs., at a cost of 11d. to 1s. 4d. a pound, while the market price is 1s. 9d. to 2s. 9d., according to whether it is refined; there is not enough produced for home consumption. The mineral resources of the country are almost wholly undeveloped; there is a lack of enterprise, and for many reasons mining industry has not advanced, owing to imperfect knowledge of the subject, want of confidence, the increased amount of capital required, and the small results obtained by those who have launched into the business. Archives show that formerly the mines of the Republic were much more extensively operated, and that they were considered of great richness.

Resources,
undeveloped.

Mining laws.

The following is a summary of some of the articles in the mining law of 1879:—Auriferous sand, alluvial deposits of iron, and other mineral productions of rivers or placers are free without license, but if worked for profit by fixed establishments a mineral right must be obtained. The discoverer, whether foreigner or not, of a vein of any sort containing valuable substances or precious stones has a right to the grant, including any metallic substances, though the vein may show signs of previous working, unless they have been a matter of previous concession. The discoverer of mines, where no other is found within three miles, is entitled to three rights, continuous or segregated, on the principal vein, and to one on each of the other veins of his discovery. The discoverer of a vein within the radius of three miles of the conceded mine is entitled to two rights, continuous or not, on such vein. Retrieving abandoned mines is equivalent to their discovery. The right of a mine includes indefinite vertical depth, with a length of 437 yards measured on the course of the vein, and a breadth of $218\frac{1}{2}$ yards. The length is measured from a point on the vein fixed by the miner, and the width by a perpendicular horizontal to its course. In the auriferous and alluvial deposits above-mentioned a right comprises 2 acres 1 rood 35 perches in a rectangle or square, or a series of connected squares. The right can be demanded of exploring a vein on its course for 90 days when a discovery is made, and no license is required for sinking shafts for the purpose of exploring the mine within the right, or beyond it, if not occupied by other mines. Mines must be worked according to the rules of the craft as to such regulations for safety and police as may be issued.

TIMBER.

Forest trees.

The forests are rich in almost every variety of tree, including all those indigenous to the tropics, many affording excellent wood for building purposes, cabinet making, and tinting; besides cedar, pine, oak, and other timber of a colder zone which grow on the mountain sides. With all this variety, however, there is comparatively little timber used or exported owing to the difficulty of

bringing it to market, or an available point for shipment, from the absence of roads and means of transport. There is a great quantity of mahogany and other valuable woods in the north, but they are only taken advantage of for export where there are streams to float the logs to the shipping port on the Atlantic. Such native wood as is used in the country is brought down on mule back. Saw mills and other appliances are greatly lacking, and the machete, or Indian knife, is almost the only tool used for felling the trees and preparing the wood for sale. The consequence is that a large quantity of timber, chiefly red wood from California, is yearly imported for consumption in that part of the country in easy communication with the Pacific ports, and this wood has the additional advantage of being seasoned, and ready for use; indeed in the interior, where planking is required, it is the only available wood to be had. Considerable attention is now being paid to the national forests, and an order was issued last year instructing the authorities in the different departments to take measures for their preservation, and to prevent abuses in wanton felling of trees; each municipality is ordered to appoint keepers, to watch the manner of felling practised, to take care of springs of water, to form artificial plantations of trees useful for constructive purposes and firewood, and to exact penalties fixed for infraction of the rules. Avenues are ordered to be planted in the towns, such trees being selected as may be adapted to the different climates, and in some parts the instructions are already being carried out, though progress has been impeded by want of water. The people are also encouraged to make plantations, principally of pine, cypress, and evergreen oak, so as in time to furnish good timber for use. Charcoal is an article of necessity being the chief fuel used for cooking, and is generally scarce and dear. It is solely supplied by the Indians, brought into the towns on mule back, and difficult to get in the wet season. Wood which is also burnt, where iron stoves are used, is becoming dearer from the greater distance it has to be brought to the towns, and promises to rise higher; it is the only fuel used for engines.

Wood.

Imported.

National
forests.

IMMIGRATION.

Immigration being considered one of the great levers in the progress of a country and the advancement of its people, by bringing new industries, useful knowledge, and strong hands for labour, there is some profession of a desire to draw the attention of foreigners to the riches of this Republic, and for this purpose a Council of Immigration was instituted a few years ago. It is now decided to publish and distribute a map giving on the reverse side, in four languages, a synopsis of the agriculture, trade, industries, legislation, and other matters of interest with a view to a better knowledge of the country. The provisions of the immigration law of 1879 have been so little acted on that it is not possible to state how far they have been carried out, nor is there sufficient experience to affirm that the advantages held out by the Society have been realised, though it is said that some Italians with no other

Desire to
promote.

capital than their labour have made a fair livelihood, some having formed extensive gardens, and others kept cows or reared pigs at a profit. A general idea of the laws of immigration, as well as of the constitutional provisions and government of the country as far as they may affect foreigners, may not be here out of place.

Regulations.

Every foreigner is considered an immigrant, whether labourer, artisan, agriculturalist, industrial or person fit for service, under 50 years of age of assured morality and aptitude, who comes to the country of his own accord, or on account of the Society or of private parties; and if over 50 years of age provided he is the head of a family counting at least two male members fit for work. Having obtained warrants of immigration they will be embarked on vessels freighted for the purpose, and be landed free with their effects, tools, portable houses, appliances, and food for six months; and the central office will lend their aid to see them guaranteed in their contract. To enjoy these advantages, they must immigrate spontaneously, or be brought by private parties through the Society, or under contract with the Society for the purpose of forming agricultural settlements or farms at fixed points. The first of these will have the Society's aid in facilitating the acquisition of land in the best obtainable situation, besides seed, animals, materials, and other necessities; the second can claim the intervention and support of the Society in the fulfilment of the promises offered them, and assistance in their journey into the interior; the third have a right to one or more lots of waste land, or such as is destined for public use to which no individual or corporation have a title. These lands can be acquired by foreigners as well as Guatemalans, vary in price from 6s. to 2s. 6d. the hectare (nearly 2½ acres), or less if 20 leagues from a hamlet, and are granted free to new settlers or immigrants as above-mentioned, or inhabitants under special circumstances. For the most part these waste lands are distant from any market or communication.

Advantages offered.

A few constitutional provisions.

According to its constitution Guatemala is a free and independent Republic; the supreme power being representative, and divided into legislative, executive and judicial. Except the children of diplomatic representatives all persons born in the country are natural Guatemalans, as well as all children of Guatemalans born abroad when they return to the country, or if, remaining abroad, they have the power to select and choose to become so.

Duties.

Foreigners the moment they arrive in the territory are strictly bound to respect the authorities and obey the laws, of which they acquire the right of the protection. No Guatemalan or foreigner can claim indemnification for damages or injuries to their person or goods caused by military operations. Foreigners are bound to observe the orders and regulations of the police, and to pay local taxes and dues imposed on account of commerce, industries, professions, property or the possession of goods, or such as may be successively imposed, whether they exceed or be less than the former.

Rights.

The enjoyment of rights are guaranteed—liberty, equality, the security of persons, honour and property to

foreigners as to natives. Every person is free to enter or leave the country except in case of detention by law. Industry is free, and inventors can take out patents and enjoy the benefits for a period not exceeding 15 years. Entail is prohibited, and mortmain, except in favour of beneficent institutions. Foreigners as well as natives can petition the authorities, and have equal rights of access to the tribunals. Foreigners, except in case of denial of justice, cannot have recourse to diplomatic intervention, and an adverse decision does not imply denial of justice. All religions are free, where their practice is not against public peace and order, or opposed to civil and political obligations. The right of association, except monastic, and unarmed meetings are permitted. Freedom of speech and of the press are guaranteed without previous censure, the abuse of the right being responsible to the law. Property is inviolable, and can only be expropriated in the public interest when the owner receives fair value. No one can be put in prison except for crime or misdemeanour, and can then only be detained for five days unless cause shown. The right of habeas corpus is recognised. Domicile and correspondence are inviolable except by order of a judge according to law. In case of invasion or attack individual rights can be suspended. There are laws regulating the rights and duties of labourers; no man can engage his services beyond four years.

PUBLIC INSTRUCTION.

Primary instruction is obligatory, maintained by the State, free and secular, but liberty is given to private education. There are 966 elementary and finishing schools, including day and night schools, in the Republic, attended in 1887 by 47,061 pupils (31,119 boys and 15,942 girls). This number exceeded that of 1886 by 2,211, and that of 1885 by 6,807, some fresh schools having been opened. The number of instructors in 1887 was 1,066—680 being men and 386 women, or one to every 44 pupils. At the Central National Institute 284 boys received secondary instruction, in the eastern 171, and in the western 36, making a total of 815; while 159 girls were educated at the Central College at Belén, 8 at the eastern, and 148 at the College, a total of 315. There are 73 professors in the three institutes for boys, and 48 in the three colleges for girls. In 1885 only 532 boys and 221 girls received instruction at these institutes. Each of the pupils costs the State in primary education 1*l.* 1*s.* 6*d.*, and in secondary 1*l.* 1*s.* 6*d.* Compulsory
education.
Schools.

Besides the above there is a school of Law, attended by 59 students at a cost of 22*l.* 5*s.* for the course of study; a school of Medicine and Pharmacy, where 274 students follow a course which costs each student 42*l.* 3*s.*; a school of engineering, attended by five students, at a cost of 133*l.* the course; a school of Arts and Sciences, where 110 pupils each cost 34*l.*; a National Conservatoire in the city, where 42 pupils each pay 66*l.*, and one at Quezaltenango, attended by 45 students, each costing 20*l.* In these schools there are 89 professors. Special
schools.

Cost to the
State.

Normal
schools.

The whole cost of public instruction in 1887 cost the country, including all expenses, £80,865 8s., whereas in 1885 the whole cost was only 45,197*l.*, which shows the stride education is taking. At the end of 1887 a normal school was established in the capital for instructors, the normal branch of the Central Institute being suppressed; the Central College for girls, as well as those of the west and east, now take the character of normal schools for mistresses. There are eight fellowships maintained for Guatemala, and four in each of the departments of the centre, north and south, and four in each of the departments of the western and eastern institutes. There are also some private colleges where both boys and girls are educated.

EXPORTS AND IMPORTS.

Exports.

Table I. shows the quantity and value of the principal articles of export for 1888 compared with the preceding year, as well as the total value of exports for the last five years. The value in 1888 amounted to 1,113,842*l.*, or a decrease of 276,833*l.*, owing to a falling in the export of coffee to the amount of 237,318*l.*, 15,120*l.* in hides, 6,295*l.* in rubber, 5,432*l.* in woollen goods, and 1,211*l.* in sarsaparilla, while specie, which was included in the exports of 1887 to the value of 15,509*l.*, does not enter as an item in 1888. On the other hand there has been a slight increase in the export of sugar, cacao and spirits. There was a considerable rise in the price of sugar and coffee, and a heavy fall in that of cacao. Coffee is almost entirely exported from the Pacific ports; sugar, cacao and spirits wholly from those ports; and bananas solely from the port of Livingston.

Imports.

Table II. gives the value of the principal imports for the last two years, and the total for five years. Table III. gives the value of imports from the different countries in 1888 as compared with the preceding year. There was a considerable increase, in 1888, in the import of cotton goods, woollen goods, flour, tinned goods and wine, and a large increase in free materials for railway and lighting purposes. Some falling off took place in the imports of beer, silk, flax, machinery, haberdashery, and a few other articles.

Empty sacks enter among the free goods in 1887, but are now taxed. Imported goods are sold at very high prices by merchants here, of whom a great number are of German nationality. The value of dutiable articles imported in 1888 amounted to 426,116*l.*, and the customs dues to 351,830*l.*; in 1887 the imports amounted to 411,893*l.*, and the dues to 346,740*l.*

Table I.—RETURN of the Principal Exports from the Republic of Guatemala in the Years 1887–88.

Articles.		1888.			1887.		
		Quantity.	Value on Board.		Quantity.	Value on Board.	
			£ s. d.	£		£ s. d.	£
Bananas ...	Bunches	113,408	0 1 6½	8,724	130,427	0 1 6½	10,033
Cacao ...	Quintals*	535	3 17 0	2,053	44	7 14 0	339
Coffee ...	"	336,398	2 14 6	1,014,643	478,691	2 12 0	1,251,961
Hides ...	"	9,502	2 6 0	21,928	10,946	3 7 0	37,048
Rubber ...	"	2,211	6 3 0	13,607	3,234	6 3 0	19,899
Sugar ...	"	44,118	1 1 6	47,512	60,677	0 15 6	46,675
Spirits ...	Gallons...	8,860	0 6 2	2,726	...	...	...
Other articles	...	...	...	2,644	...	...	9,211
Specie...	...	...	...	...	...	...	15,509
Total ...	...	...	...	1,113,842	...	...	1,390,675

* The Spanish quintal contains 100 lbs., equal to 101.449 or 101½ English lbs.

		£
Total value of exports in 1884	.. ..	759,683
" " 1885	.. ..	933,781
" " 1886	.. ..	1,033,769
" " 1887	.. ..	1,390,675
" " 1888	.. ..	1,113,842

Table II.—RETURN of the Principal Imports into the Republic of Guatemala in the Years 1887–88.

Articles.	Value.	
	1888.	1887.
	£	£
Beer.. ..	4,810	5,769
Cotton thread and cloth ..	156,502	125,480
Drugs	11,670	12,507
Flax	3,887	5,065
Flour	24,835	18,298
Hats	9,630	11,920
Haberdashery	6,727	13,200
Iron, bar and manufactured	12,101	11,612
Machinery	6,258	8,793
Paper	7,322	10,685
Sacks, empty	6,891	..
Silk, thread and wove ..	24,561	28,208
Spirits	12,550	11,276
Tinned goods	11,167	9,990
Vegetable oils	5,891	6,005
Wine and liqueurs ..	17,600	16,289
Watches, clocks, &c. ..	7,302	9,069
Woollen thread and cloth..	39,661	38,442
Other dutiable articles ..	56,751	69,290
Free goods	51,010	23,537
	477,126	435,430
Bar silver	7,423	..
Specie—		
Silver	42,307	140,388
Gold	248,896	..
Total	775,752	575,818

				£
Total value of imports in 1884	..	..	..	589,177
"	"	1885	..	582,790
"	"	1886	..	544,215
"	"	1887	..	652,524
"	"	1888	..	839,934

Including commission, freight, packing, &c., and species.

Table III.—VALUE of Imports from different Countries into Guatemala in the Years 1887-88.

Country from which Imported.	Value.	
	1888.	1887.
	£	£
England	221,934	188,900
United States	125,352	108,606
South America	111,915	98,259
Germany	101,174	44,045
France	66,859	57,811
Central America	62,608	32,703
Spain	21,129	9,434
Other countries	64,781	36,060
Total	775,752	575,818

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REFERENCE TO PREVIOUS REPORT, Annual Series No. 600.

*Presented to both Houses of Parliament by Command of Her Majesty,
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GUATEMALA.

GUATEMALA.

Consul Chapman to the Marquis of Salisbury.

My Lord,

Guatemala, June 12, 1890.

I HAVE the honour to forward herewith to your Lordship the Annual Report of the Trade and Commerce of the Republic of Guatemala for the year 1889.

I have, &c.

(Signed) ARTHUR CHAPMAN.

Report on the Trade and Commerce of the Republic of Guatemala for the Year 1889.

The official returns of the commerce of the Republic of Guatemala for 1889 show a large increase over those for 1888. ^{Increase of trade.} The exports for 1889 exceed those of 1888 by 878,287*l.*, and the imports by 407,395*l.*

The cause of this impetus to trade is attributable to the high Cause. price of coffee, the principal article of production, and the consequent increase of private capital.

The coffee crop ready for export may be calculated from Exports. November to about May, thus the increase in the exportation of Coffee. coffee in 1889 is attributable to the large crop of 1888.

					Centals.
Coffee exported in 1889..	..	..	..	..	560,675
" " 1888..	..	..	..	..	371,895

Hides and spirits show an increase over 1888, whilst there is a falling-off in sugar, bananas, and rubber. The cause for this Sugar. decrease in sugar exports is on account of the high price it commands in the home market.

There are no returns published giving the destination of Destination exports. The bulk of the coffee, however, is shipped for of exports. Hamburg in consequence of speculations in "futures" lately introduced there, and a considerable amount is shipped to San Francisco.

- Price of coffee. The price of coffee on board is quoted at 69s. the cental.
Annex A. gives the principal articles of export.
- Imports. There is a general increase in the value of all the chief
Increase. articles of importation with the exception of flour, the decrease in which is slight.
- Hardware, &c. The impetus given to cultivation, and the works on the Central Railroad, added to projected improvements in the country, have given rise to a large increase in the importation of agricultural implements, and railroad, telegraph, and electric light materials. In the returns for 1888 agricultural implements are included under the heading iron and ironware, amounting in all to 15,731*l*.; whilst under the same heading for 1889 the amount reaches 24,531*l*., to which must be added 20,967*l*. Agricultural implements are entered under a separate heading.
- The following articles also show a considerable increase :—

Dry goods.
Drugs and
liquors.

Articles.	Chiefly from.
Cotton, cloth, and yarn	England.
Drugs	United States.
Silk goods	France and China.
Wines and liqueurs	France.
Woollen goods	France and Germany.

Specie.

The increase in specie is attributable to the excess of exports over imports, and the purchase of Guatemala Bills of Exchange in South America, from whence the specie arrives.

Bar silver.

Bar silver shows a decrease.

The following is a list of other articles of importation :—

Articles.	Chiefly from.
Beer	Germany and United States.
Candles	Germany.
Cinnamon	England.
Crockery	United States.
Fence wire	" "
Furniture	" "
Galvanised iron for roofing and tubing ..	England.
Glassware	United States and Belgium.
Haberdashery	France.
Hats	"
Jewellery	Switzerland and United States.
Leather	Germany and France.
Linen	England.
Machinery	" and United States.
Matches	Germany.
Paper	France and Germany.
Petroleum	United States.
Sacks	England.
Timber for building	United States.
Tinned preserves	England and United States.
Pianos	Germany.
Vegetable oils	France.
Wheat	United States.

Expenses on importations may be calculated at 12 per cent. Expenses on dry goods, and 20 per cent. to 35 per cent. on hardware from Europe, and 3 per cent. from other countries.

Annex B. gives the principal importations and their values.

Annex C. gives the importations from foreign countries.

These statistics are misleading, for they are compiled from Misleading the custom-house invoices, and give the port of shipment as the statistics. origin of the goods.

From the statistics, however, it appears that the importations France. from France have more than doubled, owing to the Paris Exhibition. It is expected that this trade will again fall to its usual level.

The increase in the returns for the United States is owing United partly to railway material and agricultural implements; rails and States. iron bridges, however, come from England.

Specie forms the chief article imported from South America. South

With the exception of Spain and Italy all importations America. from foreign countries have increased. Yet there is a falling-off Spain and Italy. in the trade from British Honduras. This trade, which is owing British Honduras. to Belize being a free port, has fallen from 17,895% in 1888 to 14,170% in 1889.

British trade shows an increase. In dry goods it holds its British trade. own, but has suffered in hardware through German and United States competition.

There is no British commercial house in Guatemala City. Suggestions Shipments are made on credit, and it would be to the interests of for improve- British exporters to appoint agents in the Republic, who could on ments. occasion protect their interests. Advantages would also be obtained by periodical visits from agents of manufacturers; not merely commercial travellers, but agents thoroughly acquainted with the manufacturing business, who could personally ascertain the nature of the demand, and by supplying themselves with samples they would enable the manufacturers to produce for the market.

Annexes D., E., F., and G. give the returns of shipping Shipping. entered at the ports of the Republic. Statistics of vessels cleared are not published.

It will be seen from these returns that the bulk of the carrying trade is American, and that there is little difference in the number of vessels and tonnage visiting the ports of the Republic during the years 1888 and 1889.

Money is plentiful; the price on real estate is from 5 to 6 per Money cent., as against 8 per cent. in former years.

The value of property has largely increased. Government Property. lands suitable for coffee have risen in price within the last four years from 200 to 300 per cent., whilst good coffee plantations have realised as much as ten times their former value. There have been heavy speculations in land by German syndicates, the ultimate result of which appears to depend in a great measure on the labour question.

Labour.

This question is most serious. The demand far exceeds the supply, and the nature of the Indian population, from which this supply is drawn, has given rise to a system of compulsory labour under the control of the State. Wages average 1s. 5d. a day, and labour is supplied by the local authorities on demand, and the payment of about 4d. per head and travelling expenses. Again, advances are made to these men, and from these advances there has arisen a loss of capital which necessarily increases yearly. No statistics can be obtained relative to this matter.

Loss of capital.

Foreign labour.

The necessity to import foreign labour is recognised, but, as yet, no practicable scheme seems to have been found, and it stands to reason that the labour laws would have to be modified to be applied to foreign labour.

Loss of coffee.

There is, also, a considerable yearly loss of coffee through the want of hands to gather the crops.

Coffee disease.

I may here remark that the only coffee plant disease known in the country has been ascertained to be the effect of an insect, nothing more nor less than the cochineal, that has adapted itself to the coffee plant. This disease is confined to a few places where the land is impoverished, and where cochineal has formerly been cultivated.

Debt.

The foreign Consolidated Debt of the country is 922,700*l.*, and the Consolidated Interior Debt, 6,495,062 dol., equal to 976,701*l.*, at 6 dol. 65 c. to the *l.* The bonds of these debts are nearly all held in London, and interests have been regularly paid up to date since payment was resumed. There is also a Government Debt of 1,130,000 dol., paper issue, equal to 169,925*l.* Owing to the fact that payments to the Government were made compulsory in this currency, this money has remained at par.

Proposed loan.

The Government has contracted for a further loan of 4,262,500*l.* at 6 per cent. interest, to be issued at 80 and divided in the following series:—460,000*l.* for the amelioration of the financial condition of the country; 2,000,000*l.* for the construction of the proposed Northern Railroad; and 877,200*l.*, at the option of the Government, for the purchase of the Central Railroad. This contract will be cancelled if the loan is not floated by the end of June.

Railroads.

There are some 100 miles of railroad in the country. The Central Railroad from the port of San José to the capital, 73 miles, and the Champerico line, from that port to Retalhulen, 27 miles. Both these ports are on the Pacific.

Railroads in prospect.

The railroads in prospect are: one from a point on the Central line to Patalul, some 30 miles, and one from Retalhulen to San Andres and San Felipe, some 13 miles. These lines have a fair chance of being built, and will pass through cultivated districts, chiefly coffee. Should the proposed Northern line be built from the capital to the Atlantic—some 187 miles of line—it would open up a large tract of country, principally suitable for sugar and bananas, and would also ensure another channel for the trade of the country.

There are 1,991 miles of telegraph, of which 80 miles have been opened in 1889. Telegraph.

A contract has been signed for the laying of a submarine cable from the Atlantic coast in connection with the West Indies and Europe. Proposed cable.

The capital is supplied with telephone and electric light, and there are projects for establishing the same in other parts of the country. Telephone.
Electric light.

The port of San José is supplied with the electric light, of 100 candle-power. San José
port light.

The present prosperous condition of the country is dependent chiefly on the value of the coffee crops; and great efforts are being made to extend its cultivation. Provided this state of affairs continues for sufficient time to allow of the effectual carrying out of the proposed improvements in the country, and the occasion is energetically and faithfully used, Guatemala will have the opportunity to develop other resources, and to establish other means of prosperity, which would enable it to assume a more permanently commercial position of importance. Prosperity of
the country.

Annex A.—RETURN of Principal Articles of Export from the Republic of Guatemala during the Years 1888–89.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Bananas	Bunches	110,222	£ 6,629	113,408	£ 8,724
Coffee	Centals	560,675	1,910,518	371,895	1,014,643
Hides	"	15,030	31,172	9,644	21,928
Rubber	"	1,722	12,761	2,244	13,607
Spirits	Gallons	19,433	4,383	8,860	2,725
Sugar	Centals	10,174	7,537	44,780	47,512
Other articles			16,388		4,702
Specie			2,741		
Total			1,992,129		1,113,842

NOTE.—The values for 1889 have been converted at 6 dol. 65 c. to the £., the average exchange for the year.

Annex B.—RETURN of Principal Articles of Import into the Republic of Guatemala during the Years 1888–89.

Articles.	Value.	
	1889.	1888.
	£	£
Agricultural implements ..	20,967	..
Cotton, cloth, and yarn ..	227,865	203,451
Drugs	20,155	15,171
Flour	81,064	32,285
Iron and iron ware.. ..	24,581	15,731
Railway, telegraph and electric light material	105,887	49,872
Silk goods	38,241	31,929
Wines and liqueurs ..	30,934	22,879
Woollen goods	68,959	51,558
Other articles	261,633	197,388
Bar silver	4,480	9,650
Specie	581,658	378,565
Total	1,415,874	1,008,479

NOTE.—These values are gold, and have consequently been converted at 5 dol. to the 17. No statistics are given as to quantity.

Annex C.—TABLE showing the Total Value of all Articles Imported into the Republic of Guatemala during the Years 1888–89.

Country.	Value.	
	1889.	1888.
	£	£
Great Britain	319,752	238,513
British Honduras*.. ..	14,170	17,895
United States	266,480	162,957
South America	241,525	145,490
France	185,917	86,918
Germany	143,048	131,527
Central America	138,371	81,390
China	24,258	14,833
Spain	22,491	27,469
Belgium	19,746	10,059
Switzerland	17,126	15,387
Mexico	12,551	9,223
Antilles	6,313	4,574
Italy.. .. .	4,126	5,904
Japan	..	6,340
Total	1,415,874	1,008,479

NOTE.—These values are gold—5 dol. to the 17. There are no statistics of the destination of exports.

* British Honduras trade—mostly goods in transit.

**Annex D.—RETURN of Shipping Entered at the Port of
San José during the Year 1889.**

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
United States ...	8	2,180	106	166,514	114	168,694
German ...	5	2,087	10	11,843	15	13,930
Ecuador ...	...	...	1	221	1	221
Danish ...	1	570	...	...	1	570
Total ...	14	4,837	117	178,578	131	183,415
" for the pre- ceding year	16	6,286	116	178,524	132	184,810

**Annex E.—RETURN of Shipping Entered at the Port of
Champerico during the Year 1889.**

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
United States ...	6	1,546	103	161,603	109	163,449
German ...	6	2,497	10	11,943	16	14,340
Danish ...	1	570	...	...	1	570
Total ...	13	4,913	113	173,446	126	178,359
" for the pre- ceding year	7	2,720	113	175,795	120	178,515

**Annex F.—RETURN of Shipping Entered at the Port of Ocos
during the Year 1889.**

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
United States ...	3	645	36	43,436	39	49,081
German ...	...	...	4	4,686	4	4,686
Total ...	3	645	40	53,122	43	53,767
" for the pre- ceding year ...	3	927	29	37,177	32	33,104

**Annex G.—RETURN of Shipping Entered at the Port of
Livingston during the Year 1889.**

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	7	711	22	21,831	29	22,542
United States ...	1	68	44	25,265	45	25,333
Mexican ...	1	22	...	...	1	22
Total ...	9	801	66	47,096	75	47,897
" for the pre- ceding year...	11	1,225	78	51,867	89	53,092

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REPORT FOR THE YEAR 1889
ON THE
TRADE AND AGRICULTURE OF HAWAII.

REFERENCE TO PREVIOUS REPORT, Parliamentary Paper,
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*Presented to both Houses of Parliament by Command of Her Majesty,
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No. 738.

Reference to previous Report, Annual Series No. 553.

HAWAIIAN ISLANDS.

HONOLULU.

Consul-General Wodehouse to the Marquis of Salisbury.

My Lord, *Honolulu, May 9, 1890.*

IN conformity with your Lordship's instructions, I have the honour to transmit a Report for the year 1889 on the Agriculture and Commerce of the Hawaiian Islands.

It is, I may here remark, impossible to send separate reports on these two subjects, as they are so inseparably connected that without the one the other could not exist.

The report, the materials for which were collected by Mr. Vice-Consul Walker, of the firm of Theo. H. Davies and Co., and are thoroughly reliable, would have been transmitted at an earlier date, but it was necessary, to make it complete, to wait for the Annual Report of the Collector-General of Customs for 1889.

I have, &c.

(Signed) JAMES H. WODEHOUSE.

Report for the Year 1889 on the Agriculture and Commerce of the Hawaiian Islands.

The agriculture of Hawaii has continued to undergo great Agriculture. development, with respect especially to the two principal products, sugar and rice. These and other articles, which have been admitted into the United States free of duty, enjoy there a great advantage over the duty-paying similar products of other countries, and there is a probability of still larger production as long as the tariff upon importations from other countries except Hawaii is maintained in the United States.

The amount of sugar used for domestic consumption being Sugar and inconsiderable in proportion to the amount exported, a comparison sugar manu- of the exports during successive periods will fairly indicate the factories. increase in production.

The following figures are compiled from statistics of the Hawaiian custom-house:—

(930)

A 2

HAWAIIAN ISLANDS.

AVERAGE Annual Export of Sugar.

					English Tons.
5 years from 1867 to 1871	..	..	..	..	8,418
5 " " 1872 1876	..	..	..	..	10,343
5 " " 1877 1881	..	..	..	..	24,143
5 " " 1882 1886	..	..	..	..	67,724
3 " " 1887 1889	..	..	..	..	102,800

The entire amount of sugar exported goes to the United States. Previously to 1877 a considerable portion of it was sent to British Columbia, Australia, and New Zealand.

Of the capital invested in sugar plantations and factories in Hawaii, a careful analysis made a few years ago gives the following estimated distribution of ownership in respect of nationality:—

					£
American	..	..	..	..	4,500,000
British	..	..	..	..	1,000,000
German	..	..	..	..	851,000
Hawaiian and others	..	..	..	..	103,500
Total	..	..	..	..	5,954,500

Labour and
wages.

The number of labourers engaged upon sugar plantations and in factories was on January 1, 1890, as follows, according to a return provided by the Minister of the Interior:—

Hawaiians	..	..	..	..	..	1,854
Portuguese	..	..	..	..	..	3,017
Japanese	..	..	..	..	..	7,560
Chinese	..	..	..	..	..	4,517
Others	..	..	..	..	..	514
South Sea Islanders	..	..	..	..	..	433
Total	..	..	..	..	..	17,895

These figures apply to unskilled labour only, and are exclusive of mechanics and artisans. For such unskilled labour the rate of wages, from a maximum of about 4*l.* 10*s.* per month (26 days of from 10 to 12 hours) downwards, assisted immigrants, women, girls, and boys receiving lower wages according to amount paid for passage, age, and other circumstances, lodging being also provided for the labourers.

Official figures give the following as the amount of rice exported during the periods named.

Rice.

AVERAGE Annual Export of Rice.

					English Tons.
5 years from 1867 to 1871	..	..	..	..	493
5 " " 1872 1876	..	..	..	..	925
5 " " 1877 1881	..	..	..	..	2,670
5 " " 1882 1886	..	..	..	..	4,285
3 " " 1887 1889	..	..	..	..	5,392

As rice is the principal article of food of the Chinese population (over 19,000 persons) and the Japanese population (nearly 8,000 persons) of the country, it is probable that the actual production of rice is more than twice the amount of that exported, or upwards of 10,000 tons; but the culture of rice is distributed

in so many large and small fields throughout the country that no exact information can be readily gained.

The rice plantations are entirely owned by Chinese residents, many of whom are co-operative labourers.

The growth of bananas has been greatly stimulated by the admission of fruit into the United States without duty. Bananas.

The estimated value of bananas exported in 1875 is about 2,500*l.*, and that in 1889 about 27,000*l.*

The production of coffee is uncertain, and local demand leaves little for exportation; this industry has never been large, and the plantations have suffered much from blight. The quality of the berry is very good. Experiments are being made in the hope of finding localities and circumstances which will prevent the ravages of blight. Coffee.

Experimental planting of cinchona has lately attracted some attention, but as a number of years are required for the growth of plants to maturity, the result cannot yet be stated. Cinchona.

Hides and tallow are inconsiderable and variable exports, admitted into the United States without payment of duty. Hides and tallow.

Wool, of which the average amount shipped annually during 10 years from 1880 to 1889 has been 416,000 lbs., is exported usually to Europe, Australia, or Canada; about one-third of the wool produced in the country is the property of persons of British birth or nationality. Wool.

The industries of the country, beyond those which have already been spoken of as agricultural, are principally the manufacture and repairing of machinery, boilers, &c., shipbuilding and repairing, rice cleaning, and the provision of food for domestic consumption by fisheries, and the cultivation of the kalo plant (*arum esculentum*). Machinery, &c.

The construction of a marine railway, some time since, in Honolulu harbour, has added much to the facilities for the repair of ships which this place presents; and since the repairs executed, with the assistance of this marine railway, to the United States ship "Nipsic," after the hurricane at Samoa, in March, 1889, many foreign vessels have made use of the same opportunities. Marine railway.

During the year 1889, 33 steam vessels and 37 sailing vessels were placed upon the railway for repairs, the largest of which vessels was of 1,088 tons burthen. Marine boilers and engines are also made in Honolulu.

Commerce in other respects has been partly described, that is, as regards exports under the head of agriculture.

The imports consist mainly of materials for food and clothing, building materials, coal, machinery, and materials for iron working. Imports.

The following table, derived from "custom-house" statistics, will show, approximately, how importation has followed the increased agricultural production. No "analysed statistics" as to the nationality of "imports" were kept previously to 1875; the records for that year and 1876, however, probably represent

with some fairness the maximum of importation up to that time.

The figures here given fall somewhat short, in total, of the "custom-house" returns; but they indicate very nearly the amount of importation respectively from the countries named.

AVERAGE Annual Amount of Imports.

	From United States.	From Great Britain.	From British Colonies.	From Germany.	From other Countries.
	£	£	£	£	£
2 years from 1875 to 1876..	206,250	26,425	9,796	39,460	22,370
5 " " 1877 1881..	481,036	127,068	14,226	27,802	25,810
5 " " 1882 1886..	684,335	138,492	6,389	35,998	36,021
3 " " 1887 1889..	754,562	132,570	29,266	30,414	47,621

It will be seen that importations from England and the United States together have increased nearly fourfold during 15 years, the increase in importation from England being relatively larger than the rest. The rapid acceleration during the years from 1877 to 1886 was caused to a great extent by demand for sugar machinery, the greater part of which was of British manufacture.

From England is imported the bulk of the manufactures of iron brought here.

Breadstuffs, hay and food for cattle, fish, and lumber for building purposes, a considerable portion of which formerly came from British Columbia, are now, in consequence of reciprocal freedom from import duty, brought almost entirely from the United States, as are also provisions (tinned and other) of almost all kinds.

Cotton fabrics (bleached, dyed, and printed) are mainly imported from the United States, from which country they are brought here free of duty. Their consumption is increased by the smaller expense of freight and packing upon them than upon similar articles from England, as well as by the care paid in American manufactories to novel and attractive ways of preparing their goods for market.

Woollen manufactured goods are obtained principally from England.

Coal for steam purposes is largely imported from New South Wales, to the extent probably of seven-eighths of the whole importation of coal, the remainder being Welsh, Scotch, or British Columbian steam coal for manufacturing purposes from the United States.

The following statistics, compiled from "official returns," show the fiscal progress of Hawaii during the past 10 years. The amounts in sterling are computed for convenience (as they are also in the foregoing figures) at the rate of 48*d.* per dollar.

Year.	Value.		Government Revenue, Biennial. (Approximate.)	Government Expenditure, Biennial. (Approximate.)
	Imports.	Exports.		
	£	£	£	£
1880	734,654	993,689	} 414,052	456,520
1881	909,596	1,377,087		
1882	994,902	1,659,802	} 482,237	685,095
1883	1,124,848	1,626,668		
1884	927,503	1,686,984	} 659,699	668,208
1885	766,109	1,831,764		
1886	975,548	2,113,177	} 600,155	942,457
1887	988,768	1,941,410		
1888	908,177	2,380,680	} Estimated.	620,484
1889	1,087,758	2,807,988		

In addition to the revenue of 600,155*l.* in the years 1886 and 1887, the sum of about 282,360*l.* was borrowed on the security of bonds of the Hawaiian Government. ^{loan.}

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ON THE
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REFERENCE TO PREVIOUS REPORT, Miscellaneous Series No. 52.

*Presented to both Houses of Parliament by Command of Her Majesty,
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646. St. Petersburg	3d.	708. Hankow	½d.
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650. New Orleans	1d.	712. Mogador	2d.
651. Samos	½d.	713. Cadiz	½d.
652. Buda-Pesth	1½d.	714. Cadiz	1d.
653. Tripoli	½d.	715. Rio de Janeiro	2½d.
654. Buenos Ayres	½d.	716. Newchwang	½d.
655. Paris	1d.	717. Chinkiang	½d.
656. Cherbourg	1d.	718. San Francisco	6d.
657. Warsaw	½d.	719. Bussorah	½d.
658. Rome	1½d.	720. Beyrout	1d.
659. Saigon	½d.	721. Adrianople	½d.
660. Buenos Ayres	½d.	722. Nantes	½d.
661. Galveston	1d.	723. Caracas	1d.
662. Galatz	1½d.	724. Mogador	½d.
663. Antwerp	1d.	725. Tientsin	1d.
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Reference to previous Report, Miscellaneous Series No. 52.

HAYTI.

PORT AU PRINCE.

Acting-Consul Tweedy to the Marquis of Salisbury.

My Lord,

Port au Prince, April 14, 1890.

I HAVE the honour to transmit herewith my Annual Report on Trade for this Republic.

I have, &c.
(Signed) ARTHUR TWEEDY.

Trade Report for the Year 1888-89.

Trade has been very inactive during the year, showing a decrease both in imports and exports, due to the late revolution and the consequent general want of confidence.

So far as available amounted to 12,000,000 dol. gold, showing Exports. a decrease as compared with 15,000,000 dol. gold of the previous year, 1887-88.

Annex A. gives a table showing the estimated deliveries of produce, comparison with the previous year, and the ruling prices.

So far as ascertainable amounted to 6,000,000 dol. gold, show- Imports. ing a decrease as compared with 8,000,000 dol. gold of the previous year.

Great Britain continues to be the largest exporter, especially Dry goods. of the finer sorts. From printed statistics the United States of America appears to be the exporter of a large quantity of goods, which, in fact, come from the United Kingdom, viâ the United States, and are then transhipped to this island.

Almost all the flour and salted provisions come from the Provisions. United States of America.

Principally from Great Britain and Germany, viâ the United Rice. States.

Large quantities imported, German beers having the pre- Beer and ference, due to their being lighter. porter.

Considerable quantities imported from Holland. Cheese and candles.

The financial condition is not satisfactory, great expenses Finance. having been incurred during the late revolution. The Minister

of Finance is doing his best to reduce expenditure, and prevent contraband. The principal difficulty to contend with is the large amount of paper currency, which amounts to over 5,000,000 dol. The emissions were as follows:—

	Dollars.
Government of General Solomon	2,600,000
Late revolutionary party of the north	2,500,000
Total	5,100,000

Beyond these figures General Legitimes Government issued about 500,000 dol. in 5 dol. notes, which the actual Government refuses to recognise, causing a good deal of discontent. The Minister has, however, promised to place the matter before the Chamber, which meets about April 17.

Coin.

The only coin is silver and copper.

“Espèces
nationales.”

The silver being in 1 dol., 50 c., 20 c., 10 c., and put into circulation during the period of September, 1881, to December, 1886, to the extent of 2,700,000 dol. It is difficult to state how much of this coin still exists in circulation, a good deal having passed into the Republic of San Domingo, and much is supposed to have been melted down. There also exists in circulation a certain amount of old silver of 40 c., 20 c., 10 c., and 5 c. pieces, coined in the time of President Boyer (1820 to 1843).

Public debt.

No change of importance has been effected since the report made by Sir Clement Hill in 1886. The Government declares its intention of paying the coupons of interest on the Government bonds, of both the exterior and interior debt.

Custom-house
statistics and
revenue.

Custom-house statistics and revenue are not easily obtainable for 1889, but may be taken approximately as follows:—

	Dollars.
Import duties	3,500,000
Export duties	2,500,000
Total	6,000,000

The figures for the period 1887-88 are printed in the official organ, “Moniteur,” of February 5, 1890 (forwarded under separate cover on March 15). The printed returns are not very reliable, as they do not allow for the irregularities committed in the custom-house.

Change in
tariff.

A new law was enacted on October 3, 1889, by the Provisional Government, and since confirmed by the present Government, raising the duties on coffee, cocoa, and logwood as follows:—

Coffee	50 c. gold per 100 lbs.
Cocoa	25 ” ”
Logwood	1 dol. ” 1,000” lbs.

On this augmentation the usual surtax is not added—that is only leviable on the original part of the duty.

Health has been generally good throughout the country, though some sickness has been occasioned in the capital by the neglect of sanitary arrangements to meet the requirements of the large number of soldiers kept under arms, and bivouacked in the streets since the recent revolution.

Annex A.—TABLE showing Estimated Deliveries of Produce, Comparison with Previous Year, and Ruling Prices during 1889-9.

Produce.		1888.	1889.	Ruling Prices, 1888-89.
Coffee	Lbs. ...	80,000,000	50,000,000	Early part of the year, 12½ dol. to 14½ dol. per 100 lbs. Close of the year, 17½ dol. to 18½ dol.
Logwood	" ...	230,000,000	210,000,000	16 dol. to 24 dol. per 2,000 lbs.; 24 dol. to 30 dol. per 2,000 lbs., according to quality. These figures include duties and delivery on board.
Cocoa	" ...	5,300,000	2,200,000	6½ dol. to 9 dol. per 100 lbs.
Cotton (free of duty)	" ...	3,000,000	2,000,000	8 dol. to 10 dol. per 100 lbs.
Mahogany... ..	Feet ...	100,000	40,000	Logs 46 dol. to 140 dol. to 160 dol.; crutches 52 dol. to 220 dol., according to quality, per 1,000 feet superficial, and 1 inch thick.
Miscellaneous— Sugar, honey, lignum vitæ, hides, wax, and cedar.	} ...	Unimportant.		...

Annex B.—PRICES of Coffee Ruling in Port au Prince during 1889.

					Dol.	Dol.
January	..	..	..	..	12½	to 14½
February	..	..	..	..	14½	15½
March	..	..	..	..	16½	17½
April..	..	..	..	..	17½	18
May ..	..	..	..	..	19½	23
June ..	..	..	..	..	21½	21
July ..	..	..	..	..	20	19
August	..	..	..	..	22	21
September	..	..	..	..	19	18
October	..	..	..	..	17	16
November	..	..	..	..	16	17
December	..	..	..	..	17½	18½

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1889.
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N^o. 615.
DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

ITALY.

REPORT FOR THE YEAR 1888
ON THE
TRADE OF THE CONSULAR DISTRICT OF NAPLES.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 397.

*Issued during the Recess and Presented to both Houses of Parliament
by Command of Her Majesty.*

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1889.

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511. Kiukiang	1d.	573. Frankfort	1½d.
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516. Riva	1d.	578. Ajaccio	1½d.
517. Mollendo	1d.	579. Shanghai	1½d.
518. Taiwan	1d.	580. Warsaw	1½d.
519. Wuhu	1d.	581. Teneriffe	1d.
520. Corunna	2d.	582. Tangier	2d.
521. Noumea	1d.	583. Surinam	1½d.
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523. Ningpo	1d.	585. Alexandria	1d.
524. Gothenburg	2d.	586. Cagliari	1d.
525. Hankow	2d.	587. Smyrna	1½d.
526. Foochow	1d.	588. Mannheim	1d.
527. Erzeroum	2d.	589. Nagasaki	1d.
528. Ciudad Bolivar	1d.	590. Hakodate	1d.
529. Jaffa	1d.	591. Bushire	1d.
530. Ancona	1d.	592. Chinkiang	1½d.
531. Savannah	1d.	593. Pakoi	1d.
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535. Vienna	1d.	597. Copenhagen	1½d.
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537. Constantinople	2d.	599. Chefoo	1½d.
538. Damascus	1d.	600. Guatemala	1½d.
539. Tientsin	1d.	601. Tonga	1½d.
540. Amoy	1d.	602. Tahiti	1d.
541. Mogador	1d.	603. Stettin	2d.
542. Vienna	1d.	604. Vera Cruz	1½d.
543. Antwerp	1d.	605. Christiania	4d.
544. Lisbon	2d.	606. Pernambuco	1½d.
545. New York	1½d.	607. Trieste	1½d.
546. San Francisco	1d.	608. Tunis	1½d.
547. Stettin	1½d.	609. Havana	2d.
548. San Salvador	1½d.	610. Frankfort	1½d.
549. Trebizond	1d.	611. Tabreez	1½d.
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Reference to previous Report, Annual Series No. 397.

ITALY.

NAPLES.

Acting-Consul Turner to the Marquis of Salisbury.

My Lord,

Naples, August 31, 1889.

I HAVE the honour to transmit herewith to your Lordship a Report on the Trade and Commerce of this Consular District for the year 1888, together with the Reports that I have received for the same year from Mr. Vice-Consul Cocoto, on the Trade of Brindisi; from Mr. Vice-Consul Zarb, on the Trade of Gallipoli; from Mr. Vice-Consul Berner, on the Trade of Bari; from Mr. Vice-Consul Parlender, on the Trade of Barletta; from the late Mr. Vice-Consul Ashworth, a return of the principal Articles of Export and Import at the Port of Castellamare; and from Mr. Vice-Consul Cafarelli, a return of Imports at the Port of Manfredonia.

I have, &c.

(Signed) FREDERICK T. TURNER.

Report on the Trade and Commerce of Naples in the Year 1888.

IMPORTS AND EXPORTS.

The total value of imports in the year 1888 was 5,405,245*l.*, Imports and and of exports 1,693,150*l.*, the only variation noticeable, being a exports gene- decrease in imports of 300,000*l.* as compared to the previous year, rally. Particulars are given in the annexed tables, marked B and C.

The decrease in the exportation of wine during 1888, as com- Exports: pared to the previous year, was 2,772,800 gallons, value 253,624*l.* Wine. sterling, owing to the French market being closed to Italian exporters on account of the rise of the duty in France.

There was a noticeable increase in the exportation of hemp Hemp and over the previous year of 2,034 tons, value 57,404*l.* sterling. flax. Flax showed a very slight difference.

The shipments of common olive oil during the past year (1888) Olive oil. from the principal Neapolitan shipping ports were as follows:—

(757)

A 2

						Tons.
From Gallipoli..	..	..	..	..	..	5,905
Gioja Tauro	..	..	..	..	..	16,983
Taranto ..	..	..	..	..	..	1,615
Brindisi ..	..	..	..	..	..	4,346
Monopoli	..	..	..	..	..	819
Total	..	..	..	..	..	29,668

The above oil was shipped for the undermentioned destinations:—

						Tons.
To England ..	..	..	..	..	..	6,229
Russia ..	..	..	..	..	..	4,251
Italy ..	..	..	..	..	..	15,498
Other countries ..	..	..	..	..	..	3,690
Total	..	..	..	..	..	29,668

against 26,976 tons in 1886, and 23,070 tons in 1887.

The lowest and highest prices for Gallipoli olive oil in each month were as follows:—

						Per ton free on board.
						£ s. d. to £ s. d.
January	..	..	..	..	..	32 10 0 to 33 10 0
February	..	..	..	..	..	33 7 0 to 33 17 0
March ..	..	..	..	..	..	33 4 0 to 34 0 0
April ..	..	..	..	..	..	32 10 0 to 34 0 0
May ..	..	..	..	..	..	32 10 0 to 33 5 0
June ..	..	..	..	..	..	33 0 0 to 33 12 0
July ..	..	..	..	..	..	32 5 0 to 33 3 0
August ..	..	..	..	..	..	31 18 0 to 32 10 0
September	..	..	..	..	..	32 5 0 to 32 18 0
October ..	..	..	..	..	..	32 15 0 to 33 18 0
November	..	..	..	..	..	33 0 0 to 33 15 0
December	..	..	..	..	..	32 0 0 to 33 15 0

Crops.

At Gioja Tauro the crop was an almost total failure, as the olive trees, being exhausted by the abundant crop of 1887, bore no fruit worth mentioning.

In other parts of Calabria the promising prospects were considerably reduced in autumn by sirocco winds, and the quality of the oils on the western coast was more or less defective.

At the other growing districts the weather was more favourable, and from one-third to half of a full crop, or what may be considered fair average crops of excellent quality, were secured in these districts.

Owing to the prohibitory import duties on seed oils, the consumption of olive oil in Italy has greatly increased, and growers are now giving more attention to the manufacture of their oils, and a proportionately larger quantity of eating oil is now produced.

Imports: Cod-fish.

The imports of cod-fish during the past year compared with those in 1887 have been as follows:—

	In 1888.	In 1887.
	Quintals.	Quintals.
Gaspe	2,900	5,020
Shore	15,800	9,700
Labrador	19,800	14,000
Total British	38,000	28,720
Norwegian	51,500	46,950
French	27,200	34,100
Total	116,700	109,770

The past season has been most disastrous for British shippers, as with a short fishery in Newfoundland and on the Labrador high prices were paid to the fishermen, and the attempt to obtain corresponding prices on this side led to a large increase in the consumption of Norwegian and French cod-fish, and after commencing the season for Labrador cod-fish at the equivalent of about 20s. 6d. per quintal*, cost, freight, and insurance, the prices receded to as low as 8s. to 10s. per quintal towards the close of the season.

The increase in the consumption of Norwegian cod-fish is due in part to the abundant catch in Norway last year, and in part to the care and attention given to the curing and shipment of the fish.

The increased imports of French cod-fish over former years are owing entirely to the French bounty system, which gives so great an advantage to French shippers that the prohibition to buy bait in Newfoundland has had no appreciable effect as far as can be judged on this side.

The imports of British cod-fish during the past year were only about one-third of the total imports, whereas in former years the great bulk of the Neapolitan consumption was supplied by British cod-fish, and there is every probability of a further reduction, if not a total extinction, of the consumption of Labrador cod-fish, which is the most prejudiced by the French bounty system. The British Newfoundland merchants have to thank themselves for this reduction, for of late years the quality of Labrador fish has been so inferior, for apparently no attention is paid to the selection of the fish or to the curing of it.

The considerable decrease in the importation of tobacco during the present year as compared to the year 1887, of 1,903 tons, value 101,471*l.* sterling, is due to the large quantities imported by the Italian Government in the years 1886 and 1887.

There was no material variation in the importation of coffee. Of the total quantity imported (1,226 tons, value 102,960*l.* sterling), 859 tons, valued at 72,202*l.* sterling, were imported via Great Britain.

The market having been fully stocked with this commodity Sugar.

* The quintal above quoted is equal to 112 lbs. avoirdupois.

during the year 1887, I have to notify a decrease in the importation as compared to that year of 1,156 tons, valued at 15,898*l.* sterling.

Metals.

The encouragement given by the Italian Government to manufacturers of iron in Italy has had its effect on the quantities imported, and there was a noticeable decrease in the importation during the year 1888, as compared to the year 1887, of 9,769 tons, valued at 166,066*l.*

Cereals.

The importation of wheat, maize, barley, and oats continued of the same importance as the previous year; it is now obvious that Italy will be compelled for the future to draw her supplies of the above-mentioned commodities from foreign countries. Large quantities are imported from Russia, Roumania, Turkey, India, and *viâ* great Britain.

SHIPPING AND NAVIGATION.

British vessels entered in 1888.

The number of British vessels which entered the port of Naples during the year 1888 was 471, measuring 621,962 tons register, showing a decrease in the number of vessels of 66 as compared to the preceding year.

Port of Naples. San Vincenzo Mole.

Harbour Accommodation.—Very little progress has been made towards the completion of the port of Naples since my last report. The San Vincenzo Mole has been prolonged 300 feet.

Hawthorn, Guppy, and Co., Limited. Extension to workshops completed. Electric light.

Engineering Establishments.—During the year 1888 the extensions and modifications in hand in 1887 have been completed; besides two large new sheds have been added in connection with the boiler department for carrying on the fitting up of the details.

An installation of electric light on the incandescent principle is now being fitted in the boiler department, with the intention of shortly extending it to the whole factory.

Contracts delivered to the Italian Government.

During the past year they have delivered to the Italian Royal Navy two torpedo boats (Schichau type), the machinery for the torpedo chaser "Confienza," and the pumping machinery, complete, for the large new dry dock at Spezia.

Machinery for "Sardegna."

Much progress has been made with the machinery of 24,000 i.h.p. for the iron clad "Sardegna," half of the twenty boilers being almost finished, and the remaining half are in a very advanced state; the erection of the main engines for both sides of the vessel is also well forward, and many of the auxiliary engines and details, all of which are being constructed in their works, are completed.

New contracts for Italian Government.

In addition to the machinery for the "Sardegna," about which there is a very large amount of detail, two other contracts have been taken and the work on them has been commenced; namely, the machinery complete for the cruiser "Lombardia," and another set for another vessel of smaller dimensions, "Partenope" type; the former to have triple expansion engines of 6,500 i.h.p., with four double-ended boilers of the ordinary marine type; the latter with engines on the same principle of 4,000 i.h.p., with four powerful locomotive class boilers.

A considerable number of men have been taken on during the year, and, as a whole, have fairly well suited the requirements of the work.

There is a gradual tendency towards an advance in the rate of wages, equal to at least 10 per cent. over what was paid five years ago.

The new custom house tariff entails a heavy extra charge on their work, besides being very vexatious in the interpretation of the articles imported.

The operations of the coppering have been a very serious matter for the firm, as very large quantities of copper had to be purchased during the time of the high rates, and the fall came too late to have any material effect on the supply necessary for the large "Sardegna" contract.

At the present moment they have plenty of work in hand, and there is every prospect of a continuation of it.

This firm, during the past year, has executed orders for war material for the Italian Government.

They employ from 900 to 1,200 workmen, chiefly natives of South Italy.

The work in hand consists of orders for war material for the Italian Government, and comprises some guns of large calibre, for which the works are specially adapted, and a number of small rapid-firing guns with their respective carriages.

A quantity of revolving carriages are being proved at the work's batteries in the presence of a Royal Commission. They are intended for land service and will be mounted with 28 cm. Howitzers.

Two gunboats for the Italian Government have been built at the shipyard attached to these works, and are now being fitted out with hydraulic machinery, &c.; they are intended to carry one 120 ton gun each. These gunboats have a displacement of 530 tons, with a draft of 8 ft. 4 in. On their official speed trials they developed 364 i.h.p.

RAILWAYS.

The following railway lines were to be put up for private tenders:—

Three sections between Ricadi and Gioja Tauro, of the Battipaglia-Castrocucco-Paola-Reggio (Calabria) line; sixteen sections between Castrocucco and Sant' Eufemia of the same line; three sections, Marcellinara Sant' Eufemia, of the Marina di Catanzaro, Stretto Veraldi to Catanzaro line. The whole of these works to be completed within four years time.

This railway line, which, in conjunction with steamers, will connect the Islands of Procida and Ischia to Naples to within an hour's journey, is expected to be completed as far as Bagnoli in July, 1889, and to its terminus a year later.

At Torre Gaveta a harbour will be constructed where steamers will be able to ship passengers for the Islands in all weathers.

The entire length of the line is 20 kiloms. ($12\frac{1}{2}$ English miles). The Naples station is in the centre of the city at Montesanto, and it is hoped that later on it may be connected with the Naples central station and the port.

PUBLIC WORKS.

Public works.	Rapid progress is being made towards the completion of the
Galleria	Galleria Umberto I.
Umberto I.	The new embankment and quay at Santa Lucia have been
New quay at	commenced, and will redeem 87,310 square yards of seaboard.
S. Lucia.	The new Rione Vasto has been inhabited for some time past,
Rione Vasto.	but the opening up of the lower parts of Naples, voted as urgent
	in 1884, has not been commenced this year (1888).

POPULATION OF NAPLES.

Population of	The latest returns on December 31, 1888, give the population
Naples.	of this city at 513,200 inhabitants; during the year 17,090 births,
	4,294 marriages, and 14,937 deaths were registered, showing an
Increase of.	increase of 3,060 as compared to the previous year. The census
	on December 31, 1887, proved the number of inhabitants at
	Naples to be 510,140.

VOLCANIC DISTURBANCES.

Volcanic	Professor Palmieri, of the Vesuvian Observatory of the
disturbances.	University of Naples, gives the following description of the
Mount	volcanic phases of Mount Vesuvius during the year 1888 :—
Vesuvius.	

Mount Vesuvius, during the past year, has continued its moderately eruptive activity, which commenced in the month of December, 1875. There were various emissions of small lava streams, which did not reach further than the base of the cone.

An additional cone was gradually formed, caused by the activity of the motive power of the crater which, towards the end of the year, had reached a height of 100 meters (equal to 328 feet) above its original level.

On various occasions the detonations and the red-hot projectiles thrown up with the large quantities of smoke indicated greater eruptive power.

During the whole year no ashes were thrown up, and consequently the crops in the surrounding country were not destroyed.

The sublimations on the smoke issues were relatively scarce, and did not present any product that called for attention.

The sismographic instruments at the observatory did not show an activity proportionate to that of the volcano.

All the lava streams that issued during the year flowed towards the eastern slopes of the mountain.

CORAL FISHERY.

During the year 1888, very little change took place in the Coral fishery. coral industry at Torre del Greco as compared to the previous year.

The boats employed were 95, manned by crews aggregating 955 men, the total take being 322,500 kilos. (equal to 6 cwt. 1 qr.).

EXCHANGE.

The following were the average rates of exchange on London Exchange, in each month of the year 1888 :—

Sight.				Usance, 90 Days' Date.	
Month.		Highest.	Lowest.	Highest.	Lowest.
January..	.. ..	25·75	25·70	25·50	25·45
February	.. ..	25·90	25·85	25·70	25·65
March ..	.. ..	25·65	25·60	25·57	25·52
April ..	.. ..	25·57	25·52	25·50	25·45
May ..	.. ..	25·50	25·45	25·37½	25·32½
June ..	.. ..	25·37	25·32	25·25	25·20
July ..	.. ..	25·35	25·30	25·22	25·17
August ..	.. ..	25·55	25·50	25·37	25·32
September	.. ..	25·60	25·55	25·40	25·35
October..	.. ..	25·65	25·60	25·37½	25·32½
November	.. ..	25·57	25·53	25·32	25·30
December	.. ..	25·65	25·60	25·37	25·32

THE subjoined Statement, compiled from the Municipal Returns, shows the number of Births, Marriages, and Deaths in the City of Naples during the Year 1888.

Months.	Births.			Marriages.	Deaths.							
	Alive.		Still-born.		Residents.		Strangers.					
	Male.	Female.	Total.		Male.	Female.	Total.	Male.	Female.	Total.		
January ..	957	844	1,801	54	49	103	875	864	1,739	59	33	92
February ..	801	802	1,603	61	42	103	811	812	1,623	60	19	79
March ..	842	779	1,621	65	49	114	740	720	1,460	65	26	91
April ..	685	673	1,368	46	37	83	627	639	1,266	27	39	66
May ..	679	642	1,321	43	37	80	588	584	1,172	48	25	73
June ..	683	634	1,272	53	42	95	592	549	1,141	54	29	83
July ..	663	648	1,311	52	34	86	517	519	1,036	50	26	76
August ..	644	644	1,288	33	35	68	428	450	873	61	17	78
September ..	662	698	1,365	40	44	84	352	368	720	35	13	43
October ..	679	650	1,329	44	55	99	440	430	870	53	16	74
November ..	675	696	1,371	61	48	109	468	477	945	38	23	61
December ..	712	721	1,433	48	54	102	623	580	1,203	68	21	89
Total ..	8,647	8,426	17,073	600	526	1,126	7,061	6,992	14,053	623	287	910*

* Not included in the average death rate.

The average death rate per 1,000 inhabitants in the year 1888, according to the municipal returns aforesaid, was 27·5, as will be seen in the following table, which is compiled from those returns, being 0·7 per 1,000 in diminution of the preceding year:—

Months.			Number of Deaths among Resident Population.	Average Death Rate per 1,000 Inhabitants per Annum.	Total Population according to the Census of January, 1888.
January ..	..	..	1,739	40·82	..
February ..	..	..	1,623	38·10	..
March ..	..	..	1,460	34·27	..
April ..	..	..	1,266	29·72	..
May ..	..	..	1,172	27·50	..
June ..	..	..	1,141	26·80	..
July ..	..	..	1,036	24·30	..
August ..	..	..	878	20·61	..
September ..	..	..	720	17·00	..
October ..	..	..	870	20·42	..
November ..	..	..	945	22·18	..
December ..	..	..	1,203	28·24	..
Total ..	..	..	14,053	27·5	511,210

The following table shows the causes of death, and their respective percentage on the total number of deaths during the year 1888:—

Cause of Death.	Number of Deaths.	Percentage on the Total Number of Deaths.
Diseases of the fetus and congenital malformations	258	1·72
Small pox	74	0·49
Measles	484	3·23
Scarlet fever	91	0·61
Erysipelas	64	0·43
Typhoid fever	178	1·19
Diphtheria and diphtheritic croup	53	0·35
Whooping cough	49	0·33
Malarial fever	37	0·25
Dysentery	50	0·33
Syphilis	96	0·64
Septicæmia, pyæmia, blood poisoning	58	0·40
General tuberculosis	176	1·18
General scrofula	53	0·35
Rickets	10	0·07
Anæmia	69	0·46
Marasmus, senile wasting	587	3·90
Malignant tumours	851	2·35
Diseases of the nervous system	2,272	15·20
Diseases of the breathing apparatus	5,481	36·63
Diseases of the circulatory apparatus	1,314	8·78
Diseases of the digestive apparatus	1,901	12·70
Diseases of the reproductive and urinary systems (genito urinary apparatus)	358	2·39
Diseases of pregnancy, childbirth, and puerperal diseases	91	0·61
Diseases of the skin and the subcutaneous tissue	137	0·92
Diseases of the locomotor apparatus	66	0·44
Accidental deaths	227	1·52
Suicide	42	0·28
Homicide	55	0·37
Other diseases	281	1·88
Total	14,963	100·00*

* This total includes 910 deaths among non-residents.

EMIGRATION.

The emigration from the provinces in my Consular district has again increased over that of the year 1887.

In the year 1888, chiefly to North and South America, the following numbers are officially returned:—

Provinces and compartments.	ABRUZZI AND MOLISE.				
	Aquila	Campobasso	Chieti	Teramo	
					1,764
					8,348
					2,994
					41
Total					13,147

NAPLES.

11

CAMPANIA.

Avellino	3,523
Benevento	3,686
Caserta	2,827
Naples	2,395
Salerno	9,703
Total	22,134

PUGLIE.

Bari.. .. .	1,102
Foggia	1,025
Total	2,127

BASILICATA.

Potenza	9,354
Total	9,354

CALABRIA.

Catanzaro	5,092
Cosenza	9,662
Reggio Calabria	270
Total	15,024
Grand total	97,067

Of the above total number, 41,786 were embarked at the port of Naples by the following lines of steamers:—

Per Anchor line	10,895	Line of steamers.
Cyprien Fabre Company	7,531	
Navigazione Generale Italiana	15,985	
Other lines	7,375	
Total	41,786	

The total emigration from the kingdom of Italy, in 1888, was 195,993, showing an increase of 63,801 over the preceding year. Increase of emigration.

Annex A.—RETURN of all Shipping at the Port of Naples in the Year 1888.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	15	2,473	456	619,489	471	621,962
Italian	3,744	200,152	1,508	1,100,731	5,252	1,300,883
French	...	...	192	183,365	192	183,365
German	...	...	34	34,682	34	34,682
Norwegian	7	1,778	27	11,760	34	13,538
Danish	1	188	10	8,277	11	8,463
Other nations	64	20,203	79	68,093	143	88,296
Total	3,831	224,792	2,306	2,026,397	6,137	2,251,189
" for the year preceding...	3,124	224,955	2,404	1,982,340	5,528	2,207,295

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	14	2,861	459	622,168	473	624,549
Italian	3,740	203,912	1,616	1,084,489	5,256	1,288,401
French	...	...	190	184,728	190	184,728
German	1	69	33	34,773	34	34,842
Norwegian	8	2,000	28	11,427	36	13,427
Danish	1	192	10	7,968	11	8,160
Other nations	61	17,095	75	60,189	136	77,284
Total	3,825	225,629	2,311	2,005,762	6,136	2,231,391
" for the year preceding	3,602	197,403	2,437	1,988,350	6,039	2,185,753

Annex B.—RETURN of Principal Articles of Export from Naples during the Years 1888-87.

Articles.		1888.		1887.	
		Quantity.	Value.	Quantity.	Value.
Wine, oil, and spirits	Gallons ...	7,083,105	442,839	9,973,000	724,843
Drugs, colonials, and tobacco	Tons ...	116	11,102	61	4,758
Chemicals, medicine, and perfumery	"	5,115	309,742	4,724	244,147
Colours and dyes	"	121	1,102	60	745
Hemp, flax, and manufactures of	"	8,016	285,117	6,181	241,599
Cotton, and manufactures of	"	48	4,235	84	8,184
Wool, hair, and manufactures of	"	251	30,436	195	26,091
Silk, and manufactures of	"	4	12,184	3	5,634
Timber and straw	"	1,111	11,002	79	6,533
Paper and books	"	2,067	35,328	2,035	33,502
Carriery	"	526	83,673	980	154,694
Metals	"	113	14,223	269	7,866
Stones, earthenware, and glass... ..	"	8,112	18,590	2,056	9,315
Cereals	"	8,802	92,943	11,572	114,550
Live animals and animal produce	"	433	323,927	453	108,969
Sundries	"	15	11,707	40	9,768
Total		34,855	1,693,150	28,691	1,700,958

RETURN of Principal Articles of Import to Naples during the Years 1888-87.

Articles.		1888.		1887.	
		Quantity.	Value.	Quantity.	Value.
Wine, oil, and spirits	Gallons...	2,251,644	119,649	3,017,000	193,071
Drugs, colonials, and tobacco	Tons ...	2,014	185,900	5,311	242,387
Chemicals, medicine, and perfumery	"	4,982	122,686	5,031	99,727
Colours and dyes	"	3,264	95,251	1,553	93,935
Hemp, flax, and manufactures of	"	1,133	79,683	1,831	185,670
Cotton, and manufactures of	"	9,093	691,446	8,005	767,561
Wool, hair, and manufactures of	"	818	329,026	1,471	480,066
Silk, and manufactures of	"	42	141,105	49	162,433
Timber and straw	"	19,385	109,085	891	88,934
Paper and books	"	314	22,349	518	30,305
Carriery	"	2,920	273,759	2,746	248,379
Metals	"	27,224	687,229	47,551	853,294
Stone, earthenware, and glass	"	271,601	418,644	237,415	293,840
Cereals	"	129,533	1,135,565	164,350	1,345,710
Live animals, and animal produce... ..	"	9,883	842,887	11,321	409,183
Sundries	"	177	37,533	459	210,193
Precious metals and specie	"	73	613,348	...	...
Total		492,462	5,405,245	488,832	5,704,188

Annex C.—TABLE showing the Total Value of all Articles Exported from and Imported to Naples from and to Foreign Countries during the Years 1888-87.

Country.	Exports.		Imports.	
	1888.	1887.	1888.	1887.
	£	£	£	£
Great Britain	351,169	124,931	1,909,828	2,283,813
France	663,814	1,004,294	1,200,013	1,190,854
United States of America	222,912	188,826	206,749	171,463
South America	181,090	70,592	14,993	..
Egypt	44,886	53,085	77,564	11,367
Belgium	35,363	52,249	125,024	80,600
Austria	85,046	41,518	313,582	373,891
Germany	43,934	39,852	399,000	161,764
Africa	9,926	18,526	4,269	..
Turkey	15,945	17,931	388,167	706,800
Spain	6,556	22,300	7,441	..
Russia	523	1,143	431,839	154,908
Other countries	43,779	65,711	83,995	278,002
Holland	26,136	..	97,992	176,445
Greece	4,335	..	20,233	..
Switzerland	2,736	..	74,556	114,281
Total	1,693,150	1,700,958	5,405,245	5,704,188

BRINDISI.

Mr. Vice-Consul Cocoto reports as follows :—

The increase in the maritime operations of this port during the year 1888 show, as was anticipated in my report for 1887, a more marked increase over the figures of 1887 than that year gave over its predecessor, the figures having been :—

Year.	Number of Ships.	Total Tonnage.
1886.. ..	931	684,641
1887.. ..	1,207	900,771
1888.. ..	1,260	1,362,193

This result has occurred notwithstanding that during 1888, after January 31, no steamers traded between Brindisi and French ports with wine, and that owing to the increase in cost and freight of coal, causing importers to hold smaller than normal stocks on the one hand, and the diminution of that of the Peninsular and Oriental Steam Navigation Company consequent on their steamers mostly coaling elsewhere on the other; a large falling off in the arrivals of coal laden steamers has been verified.

Coal imports have been as follows :—

	1888.	1887.	1886.
	Tons.	Tons.	Tons.
Great Britain	64,291	92,323	58,208
France	562	949	498
Austria	788	405	782
Total	65,636	93,777	59,488

RETURN of all Shipping at the Port of Brindisi during the
Year 1888.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	224	417,534	224	417,534
Italian	159	11,180	406	365,600	565	376,780
Austrian	14	700	237	474,000	251	474,700
German	...	...	34	36,720	34	36,720
Greek	46	929	92	52,160	138	53,080
Belgian	...	...	1	1,422	1	1,422
Norwegian	...	...	1	707	1	707
Montenegrin	16	400	...	...	16	400
Turkish	30	900	...	...	30	900
Totals	265	14,050	995	1,348,143	1,260	1,362,193

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	223	417,529	223	417,529
Italian	155	10,370	404	364,258	559	375,148
Austrian	14	700	237	474,000	251	474,700
Greek	40	842	92	52,160	132	53,002
German	...	...	32	34,561	32	34,561
Norwegian	...	...	1	707	1	707
Turkish	27	849	...	...	27	849
Montenegrin	15	380	...	...	15	380
Belgian	...	...	1	1,422	1	1,422
Totals	251	13,661	990	1,344,637	1,241	1,358,298

The British shipping which frequented this port during 1888 is represented by :—

Services.	1888.		1887.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Peninsular and Oriental Steam Navigation Co.—Alexandria, Brindisi and Venice Service ..	59	93,717	104	163,879
Peninsular and Oriental Steam Navigation Co.—India, China and Australian Service..	99	245,866		
Cunard and Leyland lines ..	21	29,004		
Vessels with coal and pitch ..	36	40,369	49	53,629
„ „ empty casks..	2	1,453	25	19,353
„ in ballast ..	7	6,900		
Total	224	417,309	194	295,472

The increase in the above figures is mainly attributable to the alterations in the Anglo-Indo-Australian Mail services; the largest vessels of the P. and O. Company's fleet now call here and proceed hence weekly on Mondays to India, and fortnightly to China and Australia, returning homewards weekly to Malta, Gibraltar, and London, this in addition to the Venice, Brindisi, and Alexandria Line; the increase in the P. and O. tonnage has been 175,704 tons. An increase has taken place of 5,307 in the number of passengers who visited Brindisi, per P. and O. Company, eastward bound, and 6,008 in those homeward bound from the east. The aggregate British crews which visited Brindisi during 1886, 1887, and 1888 were, respectively, 14,476, 15,202, and 26,300.

An increase of 8,393 tons has taken place in the tonnage of Liverpool steamers of the Cunard and Leyland lines, which bring English goods for this province and for transhipment to Greek ports, and load local produce for England and American ports.

In the coast traffic there has been, on the contrary, a falling off of 13 vessels of 13,260 tons; and in the general cargo traffic a fall has occurred from 25 vessels of 19,353 tons in 1887, which loaded whole or part cargoes for French ports, to 9 vessels of 8,353 tons which called here in 1888, two of which only loaded cargo, taking 2,000 pipes of wine, the remainder coaling or awaiting orders.

The experimental daily mail service to Greece, instituted in 1888, has not been maintained; there are, however, five departures hence weekly for Corfu and Patras: the "Florio Rubattino," Mondays, Wednesdays, and Thursdays; the Austrian Lloyd's on Sundays; and the "Hellenic" on Fridays.

The large increase in general tonnage of vessels of all nations which used this port in 1888, as compared with 1887, amounting as it does to 461,392 tons, is in part owing to the increase of the tonnage of the P. and O. steamers, but mainly to the large increase in the movement of Austro-Hungarian vessels, which in

1888 was 251 vessels of 474,700 tons, as compared with 185 of 170,842 tons in 1887.

On the other hand, German tonnage has fallen from 51 ships of 48,887 tons in 1887, to 34 of 36,720 tons in 1888.

RETURN of the Principal Articles Imported in 1888 and 1887.

Articles.		1888.		1887.	
		Quantity.	Value.	Quantity.	Value.
Wine...	Tons	1	£ 121	43	£ 800
Spirits ...	"	2	42	33	891
Oil ...	"	...	...	63	2,649
Petroleum and other mineral oils ...	"	7	260	555	5,304
Coffee ...	"	75	6,000	108	7,130
Sugar ...	"	41	680	72	1,410
Pepper ...	"	3	190	8	377
Acids ...	"	9	144	10	650
Sulphates ...	"	44	506	69	1,677
Chemicals ...	"	15	1,200	5	168
Dyes ...	"	15	1,516	18	755
Firewood ...	"	338	365	104	121
Timber ...	"	2,621	4,718	4,356	5,398
Furniture ...	"	17	984	30	1,320
Rushes ...	"	523	4,184	250	2,005
Wall papers ...	"	10	500	17	624
Railway bars ...	"	4,339	22,165	1,289	6,547
Bricks, stone, &c. ...	"	363	2,594	...	...
Coal ...	"	65,624	60,190	98,677	83,868
Grain ...	"	712	5,465	705	5,932
Flour ...	"	36	238	319	3,959
Seeds, fruits, &c. ...	"	171	3,210	355	2,350
Iron machinery ...	"	57	2,239	186	2,239
Empty casks ...	Hectolitres	7,755	1,862	50,700	5,740
Animals ...	Number	1,347	...	1,540	28,155
Game, fish, &c. ...	Tons	10	25,802	...	...
Other articles ...	"	160	12,106	205	20,577
Total...	Tons	74,993	...	102,427	...
Casks ...	Hectolitres	7,755	157,242	50,700	...
Animals ...	Number	1,347	...	1,540	190,696

RETURN of Principal Articles of Exportation during the Years 1888 and 1887.

Articles.		1888.		1887.	
		Quantity.	Value.	Quantity.	Value.
Wine...	Tons	3,480	£ 41,770	10,350	£ 150,440
Oil ...	"	1,208	60,400	1,291	63,066
Figs ...	"	4,511	52,523	4,060	49,617
Tartars ...	"	248	16,342	29	5,040
Stones, earthen, &c. ...	"	120	273	26	65
Pottery ...	"	465	2,790	453	2,720
Empty casks ...	Hectolitres	20,106	4,825	...	...
Chemical dyes ...	Tons	6	369	7	356
Soap ...	"	4	86	6	192
Sulphur ...	"	19	54	18	60
Grain ...	"	14	90	80	464
Maccaroni ...	"	7	124	8	150
Fruits, seeds, &c. ...	"	39	883	5	52
Corals ...	"	...	60,778	...	99,865
Silk and silkworms' eggs ...	"	1	3,562	...	...
Hats ...	Number	150,273	12,022	42,828	2,912
Sundries ...	Tons	111	8,877	227	8,016
Total—Casks ...	Hectolitres	20,106	...	...	...
Hats ...	Number	150,273	265,768	42,828	...
...	Tons	10,233	...	16,620	383,015

TABLE showing the Total Value of all Articles Exported from and Imported to Brindisi to and from Foreign Countries during 1888 and 1887.

Country.	Exports.		Imports.	
	1888.	1887.	1888.	1887.
	£	£	£	£
America	36,148	7,318	3,780	3,413
Austria	61,726	57,588	12,325	24,190
Belgium	3,228	4,396	22,197	
Egypt	33,722	5,364	3,103	3,249
France	16,988	157,987	7,390	9,988
Germany	8,011	12,909	1,972	8,883
Great Britain	5,730	9,360	64,390	90,397
Greece	24,172	7,482	4,181	12,324
India	4,790	4,028	1,870	840
„ (corals)	60,778	99,865	..	..
Japan	..	22	..	1,600
Montenegro	..	182	..	3,060
Russia	3,995	..	2,363	2,740
Turkey	6,360	7,292	33,149	28,401
Other countries	120	9,272	522	1,611
Total.. .. .	265,768	383,015	157,242	190,696

The following is in explanation of the variation in the quantities and values of exports and imports of 1888 as compared with 1887:—

A much larger exportation of oil and argols has been effected to England and America, and a considerable quantity of wine has been sent to Egypt in excess of the shipments of previous years.

A very heavy diminution has taken place in exports to France, amounting to nearly 140,000*l.* value, represented entirely by wine. This, in consequence of the cessation of Treaty relations between the two countries.

Besides an increase in wine exports to Egypt and Austria, from the Brindisi railway station 2,512 railway trucks, each at least 10 tons capacity, were dispatched to North Italy; about 500 trucks equal to 5,000 tons weight, contained grapes for enological purposes, and the remaining 2,012 wine.

The value of these 25,000 tons calculated at 12*s.* for a quintal of grapes, or hectolitre of wine, say 2 cwts. or 22 gallons, would give a total value of 150,000*l.*, which is more than the deficiency in the wine exports to France.

Besides the system of bounties to Italian vessels importing coal from foreign countries—since the suspension of Treaty relations with France—the Italian Government has introduced a system of drawbacks in favour of wine exporters, who obtained 1 fr. 98 cents. per hectolitre and a degree on each degree over 11°; wine exported from this district being usually from 14 $\frac{3}{4}$ ° to 15°, the refund is consequently from 6 fr. to 8 fr. per hectolitre; the cost of the wine in quantities being about 15 fr. per hectolitre. It is consequently quite possible, should no other markets offer, that exports in wine

to France may be resumed, provided a duty-paid price at Cette or Bordeaux of 40 fr. per hectolitre be obtainable.

Up to the month of February, 1889, all steamers belonging to foreign nationalities were compelled to produce a consular order of clearance, on which the local authorities based their bill of health and customs clearance. The abolition of such document for British vessels not remaining in port 48 hours, which has been intimated to me by the local port office, under date of 16th March, 1889, inasmuch as the great majority of British vessels do not remain in port for 48 hours, will render it a matter of difficulty to obtain reliable information from the local authorities as to the movements of British shipping; the record kept at the port offices being incomplete in many particulars, besides this a very considerable diminution in the income from fees must ensue, seeing that it will now be only necessary for a steamer agent to clear a vessel within the 48 hours prescribed, to render the captain reporting himself at the consulate unnecessary as also to escape the payment of fees.

GALLIPOLI.

Mr. Vice Consul Zarb reports as follows :—

Shipping and Navigation.

Foreign
shipping.

The number of ships of all nations which cleared from the port of Gallipoli at the close of the year 1888 was 184, and their burthen 15,046 tons. Besides these are 186 steamers of the burthen of 137,580 tons, thus bringing up the total tonnage to 152,626 tons, compared with the year 1887 there has been an increase of 28 sailing of 1,224 tons and a decrease of 16 steamers of 11,968 tons.

British ship-
ping.

The British flag even last year maintained its superiority both in number and tonnage, over those of the other nationalities in the carrying trade of this port, as compared to the previous year there has been a decrease of 9 sailing of 1,262 tons, and 17 steamers of 15,171 tons; the annexed table A gives the full particulars. It is, however, unpleasant to have to report that in consequence of the interruption of the commercial relations between Italy and France the number of steamers loaded with wine, respectively employed in direct trade with France, has diminished considerably, compared with what it was formerly.

Trade and Commerce.

Exports.

Table B herewith annexed shows the increase and decrease of the principal article of exports from the port of Gallipoli during the year 1888, as compared to the previous year.

Olive oil.

In the shipment of olive oil there has been a very remarkable falling off, in consequence of the relative demands from foreign countries, the quantity exported during the year 1887 in British and foreign vessels amounted to 60,683 quintals, or 5,742 tuns; of

Exports of
1887.

which 3,574 tuns went to England, 1,877 to Russia, 259 to France, and 32 to Austria.

In the year 1888 it amounted to 45,576 quintals, or 4,299 tuns; of which 2,440 tuns went to England, 1,753 to Russia, 59 to Holland, and 47 to France; showing a decrease of 15,295 quintals, or 1,443 tuns, compared with the previous year. The existing stocks of old and new oil in the merchants' stores of this town, at the close of the year, were about 36,209 quintals, or 3,416 tuns, and a good deal in the country districts.

Although the shipment of wine from this port for France has stopped since the month of March of last year, in consequence of the unfortunate rupture of the Treaty of Commerce with France, there has been a remarkable increase in the exports during the seasons 1887-88 compared with the preceding years.

The quantity exported up to close of the seasons 1886-87 in British and foreign bottoms amounted to 9,851 tuns; of which 3,249 tuns went to Italy, 6,595 to France, and 7 to America.

In the seasons 1887-88 the quantity exported in British and foreign bottoms amounted to 11,808 tuns; of which 4,767 tuns went to Italy, 6,999 to France, 22 to Germany, 11 to Switzerland, 3 to Holland, and 6 to Turkey; showing an increase of 1,957 tuns compared with preceding years. These figures are exclusive of the large quantities which went into the interior by railway. Notwithstanding that the yield of wine was satisfactory, the agricultural classes and the landowners are in a most lamentable condition, owing partly to exceptionally low prices, and partly to there being no demand from other foreign countries. Prices at the beginning of the season 1887-88, since the month of March, ranged from 25 lire to 30 lire per hectolitre, when prices which have been extremely low went down from 17 lire to 11 lire, and a large quantity of old wine was sold for distilling about 5 lire to 5 lire 50 cents. per hectolitre. The remunerative prices obtained formerly for grapes bought by speculators, and sent to upper Italy, has diminished considerably last year.

On this unfavourable state of affairs several proprietors of this town, having a large stock of wine without finding purchasers, have endeavoured to open wine stores for the sale in retail of this article, but prices were considerably lower than usual.

It will, indeed, be a serious thing for the district of Gallipoli, if efficient steps be not taken in some way or other concerning the interruption of commercial relations with France.

Although this trade at present is of but little importance in consequence of the extending introduction of empty petroleum casks, nevertheless last year there has been a slight increase, the total quantity of empty casks exported during the year 1887 in British and foreign vessels amounting to 1,708 tons capacity, of which 615 tons went to Italy, and 1,093 tons to Turkey. In the year 1888 it amounted to 1,805 tons capacity, all of which were shipped to Italy, showing an increase of 97 tons capacity compared with the year 1887.

Imports.

With regard to the imports little can be said, owing to the difficulty of obtaining accurate and reliable information as to the statistics of trade, for reasons mentioned in previous reports, viz., that the custom house neither give nor publish such information of the large quantities of goods imported from several ports of Italy in which duty was paid.

I should not, however, omit to report that officially the custom house authorities of Gallipoli are ordered henceforward to remark all operations of coasting trade, so that for the future a complete statistical information can be obtained from these custom house authorities.

Freights.

The rates of freights effected by sailing vessels for Goole and Glasgow were 1*l.* 7*s.* 6*d.* to 1*l.* 10*s.* per ton, and half a gallon of oil per ton primage. France, by steamers, for wine, 24 fr. to 30 fr. per ton.

Exchange.

The rate of exchange in London, during the year 1888, varied from 25 lire 50 cents. to 25 lire 75 cents. per 1*l.* sterling.

Public Works.

Harbour works.

Under the head of public works may be noted the project of constructing a breakwater from the lighthouse situated on the north of the new quay (so-called "Raffo") towards the north, at about 400 metres from the quay, and it is asserted that the work will commence shortly. The port of Gallipoli was of third class, according to the old law; it is not yet classified otherwise, but it is well to hope that it will be declared of first class as a refuge port for vessels. In fact, in the whole of the long stretch of coast from Capo St. Maria di Leuca to Reggio there is neither a harbour nor a safety bay for refuge of vessels. The port of Cotrone is scarcely commenced, and competent persons are unanimously of opinion that the improvement of Gallipoli harbour is necessary, the total cost of the harbour works as projected being estimated to amount to 1,500,000 lire.

Port of Gallipoli.

Port of Cotrone.

Gallipoli harbour is the emporium of the Salentina peninsula, and has a remarkable commercial importance specially for olive oil and wine trade, so that it is to be hoped the Government will at no distant date recognise the necessity of carrying out the necessary improvement.

I am sorry, however, to say that the dredging of the port, commenced in 1884, when the work was brought to 5 metres of depth on an area of about two-thirds of the whole enterprise, remains stationary and without any signs of early improvement, a fact most detrimental to the commercial interest of the port.

Market-place.

In concluding this notice I have to add that the large market-place mentioned in my last year's report is still under construction. It is hoped that this work will probably be soon completed; it is not known when it will be opened to the public. The total cost is estimated to amount to 80,000 lire.

Private Building.

I have nothing further to add of importance except the greater Building. extent of habitable ground and building of houses and warehouses in suburbs beyond the bridge by private individuals of Gallipoli, and this, linked with financial speculations, buying and selling operations, contractor's undertakings, and other industrial enterprises for establishment of the wine trade, has given rise to an important movement in business.

Telegraphs.

A new telegraphic service for the Government and private Telegraphs. parties has been established in this jurisdiction by the central office of Gallipoli to the following countries, viz., Parabita, Matino, Casarano, Ruffano, Ugento, Maglie, and Lecce.

Public Health.

The health in this district was satisfactory, no cases of cholera Public health. or other contagious disease having occurred during the twelve months. The population has varied but little, remaining at about the same figure, as will be seen by the annexed statements of births, marriages, and deaths compiled from the municipal returns.

THE following Table shows the number of Births, Deaths, and Marriages in the City of Gallipoli in the Years 1888-87.

Months.	Births.			Deaths.			Marriages.
	Male.	Female.	Total.	Male.	Female.	Total.	
January	26	23	49	15	6	21	4
February	19	23	42	13	14	27	9
March... ..	21	20	41	9	8	17	4
April	17	19	36	5	5	10	11
May	19	9	28	3	12	15	5
June	10	10	20	12	14	26	6
July	15	14	29	9	13	22	5
August	20	22	42	17	16	33	6
September	24	18	42	12	16	28	8
October	15	17	32	17	9	26	9
November	19	16	35	13	12	25	14
December	20	21	41	12	16	28	17
Total	225	212	437	137	141	278	98
„ 1887	202	236	438	103	149	257	98

Total population, 11,428.

Annex A.—RETURN of all Shipping at the Port of Gallipoli in the Year 1888.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	13	1,266	10	7,113	23	8,379
Italian	166	13,162	169	126,653	345	139,815
Norwegian	7	1,017	6	2,258	13	3,275
German	...	...	4	3,014	4	3,014
Danish	4	473	7	5,655	11	6,128
Austrian	4	280	...	...	4	280
Greek	1	93	...	...	1	93
Ottoman	2	21	...	...	2	21
Total	197	16,312	196	144,693	393	161,005
" 1887	177	16,251	229	171,832	406	188,083

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	13	1,266	10	7,113	23	8,379
Italian	166	13,162	169	126,653	335	139,815
Norwegian	7	1,017	6	2,258	13	3,275
German	...	...	4	3,014	4	3,014
Danish	4	473	7	5,655	11	6,128
Austrian	4	280	...	...	4	280
Greek	1	93	...	...	1	93
Ottoman	2	21	...	...	2	21
Total	197	16,312	196	144,693	393	161,005
" 1887	178	16,350	229	171,832	407	188,182

Annex B.—RETURN of Principal Articles of Export from Gallipoli during the Years 1887 and 1888.

Articles.	Weight or Measure.	1888.		1887.	
		Quantity.	Value.	Quantity.	Value.
Olive oil	Tuns ...	4,299	£ 138,839	5,742	£ 189,317
Wine	" ...	11,808	83,615	9,651	94,008
Empty casks	Tons ...	1,805	3,453	1,708	3,375
Dried figs	" ...	1,846	11,173	286	3,290
Olive husks	" ...	670	674	106	112
Firewood	" ...	32	27	...	...
Sardines	" ...	21	623	...	...
Fennel seed	" ...	20	361	...	...
Total	...	...	238,770	...	290,102

These figures are exclusive of the large quantities of goods exported to Italy, which were free of duty.

RETURN of Principal Articles of Import to Gallipoli during the
Years 1887 and 1888.

Articles.	Weight or Measure.	1888.		1887.	
		Quantity.	Value.	Quantity.	Value.
Iron	Tons ...	5	£ 134	350	£ 8,444
Sugar	" ...	12	98	...	...
Coffee	" ...	14	1,139	27	2,146
Codfish	" ...	52	1,637	21	680
Corn	" ...	...	...	2	54
Sardines	" ...	42	1,254	...	...
Timber	Metres ...	1,419	1,702	2,280	2,774
Petroleum	Tuns ...	51	4,149	59	4,460
Spirit	" ...	...	...	9	752
Wine	" ...	...	...	14	290
Flour	" ...	...	...	15	300
Beans	Tons ...	...	...	190	1,614
Cheese	" ...	61	416	2	112
Glass	" ...	...	...	21	718
Pepper	" ...	3	125	2	80
Skins	" ...	...	...	2	35
Rice	" ...	6	64	...	...
Bulrush	" ...	12	105	...	...
Sundries	" ...	...	...	...	6,321
Total	...	...	10,823	...	28,760

These figures are exclusive of the large quantities of goods imported via Naples, Bari, and other ports of Italy, on which duty was paid.

Annex C.—TABLE showing the Total Value of all Articles
Exported from Gallipoli and Imported to Gallipoli from and
to Foreign Countries during the Years 1887 and 1888.

Country.	Exports.		Imports.	
	1888.	1887.	1888.	1887.
	£	£	£	£
Great Britain	79,493	117,842	707	4,160
Italy	34,400	32,361	1,254	..
France	53,888	71,459	665	3,292
Russia	56,621	61,869	570	..
Austria	11,534	4,326	2,320	10,036
America	..	86	3,659	4,495
Greece	628	..	..	402
Turkey	26	2,159	105	54
Holland	1,928	..	..	..
Norway	..	..	1,543	..
Germany	168	..	..	..
Switzerland	84	..	..	..
Sundries	..	..	..	6,321
Total	238,770	290,102	10,823	28,760

BARI.

Trade
generally.

Mr. Vice-Consul Berner reports as follows:—

The crisis, which I mentioned last year, still continues in 1888. The restrictions of credit on the part of leading bankers checked dealings of a number of unsound concerns, forcing some to suspend payments, a result which can only be looked upon with satisfaction on the part of those doing sound business.

On the other hand, it cannot be denied that the scarcity of money has had an unfavourable influence upon the agrarian interests of our quarter.

There occurred not only a depreciation in values of goods (since producers, hard up for money, were obliged to realise at any price), but all improvements in the country have been, to say the least, put off.

Exports.
Wine.

The tariff war with France continuing, shipments of wine to that country are also further checked. Trade, however, has been thereby urged to look out for other markets, and the result obtained in that direction has been a good one.

Above all it is in the River Plate that our produce has given satisfaction, exports to that quarter having assumed large proportions. Up till now, goods were forwarded either *viâ* Naples or Genoa, yet with the coming year direct steamships will call here for the River Plate.

It is a fact that our producers do not spare either trouble or expense in order to answer requirements of foreign consumers, both with regard to taste and uniformity of the wine.

England also appears more and more to appreciate our product; business is, however, still difficult on account of the competition of Bordeaux clarets, which, though not always of blameless quality, easily command prices owing to their popularity.

When the consuming public have found out that their advantage lies on this side, on account of cheapness as well as hygiene (our wines being absolutely pure), the beginning that has been made will soon dissipate old prejudices.

It would be well that English consumers should not go too much by the "exhibition wines," since experience has shown that such serve less to acquaint the public with accredited brands, than to make a "business" by getting rid of more or less defective parcels.

Olive oils.

Also in olive oils, an article of no less importance for us than wine, transactions have been fairly active, specially with France, in spite of the differential duties. The fact is, our product surpasses all other descriptions with regard to keeping, and is therefore specially fit for packing sardines, which have sometimes to be kept for several years. This strength of our oils is due to the early plucking of the olives. Crop begins with us already in autumn and is nearly at an end in February, whilst in the Riviera of Genoa and in South France the same begins only in winter, and is protracted until June. The yield of such olives, which are

allowed to ripen too much, is subject to get rancid sooner. The circumstance that the output of South Italy, specially for eating oils, surpasses that of all other European oil-producing countries taken together, is of course a principal factor for the cheapness of our rates. This, again, is a guarantee for the genuineness of the oil, since mixtures with more or less unwholesome substitutes would yield no profit. This fact should interest English consumers, specially as, in latter times, no few cases of adulterations have been tried before British courts with so-called Tuscan oils shipped from Leghorn.

Grain has contributed little for export this year, only barley Grain. has interested Scotch consumers. Wheat has not been exported Barley. at all. Wheat.

Imports are considerably less than last year. The cause lies Imports. in the impoverished condition of our province—speculation has diminished on account of the restriction of credit, and consumption has decreased owing to lack of ready money.

Dried fish shows an increase of consumption, such article being Dried fish. cheaper than many other sorts of food.

Coals too were imported in larger quantity, want of fuel having Coals. augmented specially for steamers of national flag, the fleet of which has increased.

The Steamship Company "Pugha" now owns nine steam Navigation. vessels, and is said to be about purchasing two other steamers in the coming year.

Annex A.—RETURN of all Shipping at the Port of Bari in the Year 1888.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	504	94	106,799	98	107,303
Italian	313	14,993	419	275,918	732	290,911
French	1	214	...	...	1	214
German	...	...	16	11,376	16	11,376
Austrian	24	1,554	6	2,164	30	3,718
Greek	11	838	...	...	11	838
Others	31	1,494	26	14,388	57	15,882
Total	384	19,597	561	410,645	945	430,242

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	504	94	105,482	98	105,986
Italian	314	15,374	414	272,847	728	288,221
French	1	214	...	...	1	214
German	...	...	16	11,376	16	11,376
Austrian	25	1,597	6	2,164	31	3,761
Greek	13	1,218	...	...	13	1,218
Others	31	1,771	25	13,565	56	15,336
Total	388	20,678	555	405,434	943	426,112

Annex B.—STATISTICS for the Port of Bari for the
Years 1888 and 1887.

IMPORTS.

Principal Articles.		1888.		1887.	
		Quantity.	Value.	Quantity.	Value.
Colonial produce, drugs, and tobacco	Tons ...	1,264	£ 108,664	1,866	£ 152,218
Hemp, flax, jute, and manufac-	" ...	284	14,184	422	17,624
tured goods thereof ...	Lbs. ...	4,544,960	305,010	6,678,880	444,320
Cotton yarns and weaving ...	Tons ...	38,379	63,284	23,484	40,374
Coal ...	" ...	4,121	148,366	8,002	352,004
Metals, rough and wrought	" ...	1,214	12,142	1,619	16,200
Caustic soda ...	" ...	1,129	23,882	2,800	78,420
Petroleum ...	" ...	2,906	50,324	2,760	50,400
Flour ...	" ...	2,464	77,938	2,100	84,000
Dried fish ...	" ...	27,311	54,625	37,169	74,335
Timber ...	Cub. m. ...	1,816	2,630	2,521	5,042
Bricks ...	Tons ...	...	26,150	...	42,496
Sundries ...	...	...	...	...	...
Total ...	...	...	893,199	...	1,357,433

EXPORTS.

Principal Articles.		1888.		1887.	
		Quantity.	Value.	Quantity.	Value.
Olive oil ...	Tons ...	15,550	£ 715,300	20,937	£ 897,868
Wine ...	Gallons ...	434,471	147,644	590,177	323,245
Almonds ...	Tons ...	4,983	338,864	5,611	313,449
Tartars ...	" ...	2,202	158,572	1,953	118,394
Soap ...	" ...	2,777	44,424	4,210	67,350
Hides ...	" ...	316	27,232	336	31,488
Seeds ...	" ...	1,547	46,407	694	14,796
Figs ...	" ...	1,131	11,311	1,408	16,893
Pulse, potatoes ...	" ...	1,708	16,760	1,981	17,879
Carob beans ...	" ...	1,401	7,890	1,802	7,928
Grain ...	" ...	1,318	13,175	718	7,180
Sundries ...	...	...	14,416	...	17,312
Total ...	...	...	1,541,995	...	1,884,382

Annex C.—STATISTICS for the Port of Bari for the Trade with Foreign Countries in the Year 1888, compared with 1887.

IMPORTS.

Country.	1888.	1887.
	£	£
Great Britain	172,086	278,323
Austria-Hungary	150,458	280,373
United States of America ..	78,388	108,586
Belgium, Holland	16,192	9,711
Denmark	..	2,617
France	19,433	36,958
Germany	11,969	34,102
Greece	1,873	7,271
Sweden and Norway	9,526	41,162
Russia	1,941	..
Switzerland	4,640	9,677
Turkey	20,236	61,262
Other countries	3,643	23,906
	490,385	893,938
Italy	402,814	463,495
Total	893,199	1,357,433

EXPORTS.

Country.	1888.	1887.
	£	£
Great Britain	80,318	107,881
Austria-Hungary	162,168	206,838
United States of America ..	77,768	94,381
Belgium, Holland	44,380	24,006
Denmark	8,534	2,205
France	198,146	768,603
Germany	158,018	140,390
Greece	1,645	1,932
Sweden and Norway	3,100	4,680
Spain and Portugal	10,208	6,626
Switzerland	3,402	10,174
Turkey	5,287	21,127
Other countries	1,809	1,276
	754,783	1,390,119
Italy	787,212	444,263
Total	1,541,995	1,834,382

BARLETTA.

Mr. Vice-Consul Parlender reports as follows:—

The year just ended has not been very favourable to the material development of this district. As I had the honour to point out in my report of the preceding year, the rupture of commercial relations between this country and France, and the ensuing war of tariffs has surpassed in its effects the darkest anticipations.

Wine.

This district in which wine only is produced, and in which wine only is worth producing, has passed from wealth and general activity to utter misery on account of being unable to sell at any price whatever their only produce.

Through France having been for so many years almost the only buyer of Barletta wines at highly remunerative prices, every care had been taken to grow "vins de coupage" only, in order to please the French market, which used these wines for mixing up with other sorts.

Thus, when the export to France was made an impossibility, it was found that the wines of this district, being unfit for direct consumption, were of no value whatever for the requirements of other markets.

Attempts have been made to better the taste, the colour, &c., of these wines, and then to introduce them in South America, England, Northern Europe, &c.; but, if not a complete failure, these attempts have done very little good, and it is not considered that they will do much good, partly on account of the low prices they have fetched on the new markets, and partly because they cannot be expected to have immediate practical results, though they may reach their purpose in the long run.

Crops.

Meanwhile the population are in need of immediate help. The crop of 1888 has been added to the large stock left of that of 1887, and should buyers still remain scared, it is anticipated that very few landowners will have money for gathering up, and localities sufficient for preserving the coming new crop.

Alcohol.

The only way of avoiding the impending misery, which is chiefly originated by the nature of the wines themselves, which do not keep sound, would be to distil them into cognac or wine alcohol, which is a far superior produce to the alcohol made from potatoes, beet-roots, molasses, &c.

The experiences made lately by Mr. Emile Alglave on this subject are conclusive.

Alcoholic experiments.

Two small pigs of the same age and constitution were administered an equal dose of alcohol of the two sorts. The one which had taken wine alcohol looked drunk, but by no means sick. It was even able to walk. The other one, on the contrary, was unable to move, and had to lie down as if thunder-struck.

Mr. Alglave repeated his experiments on two dogs. The one reeling only in walking, showed no appearance of suffering, whilst the other one lay on his back as if labouring under an epileptic attack, his paws and the whole body in convulsions. Later on, when compelled to stand up, it jumped up as if mad and tried to bite.

Thus the alcohol question is not limited to this country only, but is one of capital importance for the whole world.

If it be remembered that France's yearly consumption of alcohol amounts to more than 1,800,000 hectolitres, of which only 25,000 hectolitres are wine alcohol; one has no difficulty to see how useful it would be for this country to reduce the now nearly worthless stock of wines into this far more valuable produce,

which has nothing to fear from time, as, on the contrary, it improves by it; and which would find buyers in every part of the world and contribute to the health of the spirit drinking communities.

However, the taxes charged in this country are so heavy on ^{Tax on} the alcohol industry that it must be given up. ^{alcohol.}

The Government has been asked to introduce a new law in order to facilitate the production and the sale of wine alcohol, but they have up to this day taken no decision on this subject, although very urgent petitions have been addressed to them by every class of citizens. A meeting held lately in Bari by the representative bodies of this province, and in which the municipal and provincial councils, the mayors, &c., were present, went so far as to pass a resolution that they would give in their resignations "en bloc" if the Government did not grant them their demands.

This gives an idea of the present situation of this part of Italy, and in fact it is so bad that it cannot be worse, and if nothing is done towards the lower classes, the peasants chiefly, to put an end to the present general stagnation of every branch of industry, trade, and agriculture, it is impossible to foresee what the future has in store for this district.

The accompanying tables of the shipping trade and of the Shipping, exports and imports as compared with those of the preceding ^{exports and} year, will speak for themselves, and will show how large has been ^{imports.} the decline in the commercial activity of this country.

I may further add that while the deposits at the Barletta Savingsbanks. Savings Bank amounted to 6,122,327 Italian lire on December 31, 1886, they were, on the last day of 1888, only 4,652,486 lire.

On the other hand, the property pawned at the same banking office was 202,775 lire on December 31, 1886, and 465,832 lire on December 31, 1888.

Mortgages on the landed property mortgaged at the National Mortgages. Bank amounted to 2,600,000 lire in the year 1888 only.

The wine and olive crops were satisfactory both with reference Crops. to quality and quantity. The corn crop, on the contrary, was a complete failure.

The provincial council have decided to build waterworks for Public works. the supply of 64 towns in the provinces of Bari, Foggia, and Lecce, and are looking for suitable offers.

**Annex A.—RETURN of all Ships Entered and Cleared in the
Port of Barletta during the Year 1888.**

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	18	15,240	18	15,240
Italian	141	11,340	170	91,864	311	103,204
Austro-Hungarian ...	8	462	1	708	9	1,170
Other countries ...	...	...	9	5,273	9	5,273
Total	149	11,802	198	113,085	347	124,887
„ for the year preceding	...	...	...	...	475	177,022

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	19	15,996	19	15,996
Italian	140	11,410	167	89,986	307	101,396
Austro-Hungarian ...	8	462	1	708	9	1,170
Other countries ...	1	149	9	5,293	10	5,442
Total	149	12,021	196	111,983	345	124,004
„ for the year preceding	...	...	...	...	473	175,861

**Annex B.—RETURN of Principal Articles of Export from the
District of Barletta during the Year 1888.**

Articles.	1888.		1887.	
	Quantity in 1,000 tons.	Value in 1,000,000 lire.	Quantity in 1,000 tons.	Value in 1,000,000 lire.
Wine	40	10	70	25
Brandy	1 $\frac{1}{10}$	11	1 $\frac{1}{2}$	15
Tartars	0.700	1 $\frac{1}{2}$	0.450	1
Wine lees	0.650	$\frac{1}{2}$	0.500	$\frac{1}{3}$
Total	42.450	23	72.450	41 $\frac{1}{3}$

N.B.—The above values are quoted in millions of lire. 25 lire equal to 1*l.* sterling.

CASTELLAMARE.

RETURN of all Shipping at the Port of Castellamare di Stabia,
1888.

ENTERED.

Flag.	Number of Vessels.	Tonnage.	Crews.
British	61	61,723	2,087
Austrian.. .. .	4	1,649	49
Greek	128	30,455	1,539
Italian	148	58,681	1,220
Dutch	6	1,781	165
Total	347	154,289	5,060

RETURN of Principal Articles of Export from Castellamare di
Stabia during the Year 1888.

Articles.	Quantity.	Value.
	Tons.	£
Building stones	9,000	5,400
Peas and beans	465	4,844
Maccaroni	61	1,230
Green fruit	3,797	15,188
Dry fruit	1,049	25,192
Potatoes and vegetables ..	5,827	13,987
Wines	111	1,116
Sulphur	30	144
Oil	299	10,196
Other articles	2,122	5,099
Total	22,761	82,396

RETURN of Principal Articles of Import to Castellamare di
Stabia during the Year 1888.

Articles.	Quantity.	Value.
	Tons.	£
Oil	56	1,900
Iron	5,012	84,203
Grain	25,515	154,742
Indian corn	315	252
Coal	59,637	59,637
Salt fish	58	3,516
Other articles	4,182	12,270
Total	94,775	316,520

MANFREDONIA.

RETURN of Articles of Import to Manfredonia during the Year,
January 1st to December 31st, 1888, in British Vessels.

Articles.		1888.	
		Quantity.	Value.
Coals	Tons at 24 lire	4,890	£
"	Per Italian ton	..	4,513 ²² / ₁₀₀

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503. St. Petersburg	1d.	564. St. Petersburg	2½d.
504. Rio de Janeiro	4d.	565. Söul	1d.
505. Brest	1d.	566. Newchwang	1d.
506. Dunkirk	1d.	567. Roustchouk and Philippopolis	1d.
507. Genoa	2d.	568. Stockholm	1½d.
508. Beyrout	1d.	569. Tonga	1d.
509. Colonia	1d.	570. Chicago	1½d.
510. Marseilles	1d.	571. Adana	½d.
511. Kiukiang	1d.	572. Buenos Ayres	3d.
512. Buda-Pesth	2d.	573. Frankfort	1½d.
513. Wenchow	10d.	574. Canton	1½d.
514. Coquimbo	1d.	575. Tamsui	5½d.
515. Charleston	1d.	576. Palermo	8d.
516. Riga	1d.	577. Amsterdam	1d.
517. Mollendo	1d.	578. Ajaccio	½d.
518. Taiwan	1d.	579. Shanghai	1½d.
519. Wuhu	1d.	580. Warsaw	½d.
520. Corunna	2d.	581. Teneriffe	1d.
521. Noumea	1d.	582. Tangier	2d.
522. San José	1d.	583. Surinam	½d.
523. Ningpo	1d.	584. Loanda	1d.
524. Gothenburg	2d.	585. Alexandria	1d.
525. Hankow	2d.	586. Cagliari	1d.
526. Foochow	1d.	587. Smyrna	½d.
527. Erzeroum	2d.	588. Mannheim	1d.
528. Ciudad Bolivar	1d.	589. Nagasaki	1d.
529. Jaffa	1d.	590. Hakodate	1d.
530. Ancona	1d.	591. Bushire	1d.
531. Savannah	1d.	592. Chinkiang	½d.
532. Batavia	1d.	593. Pakhoi	1d.
533. Adrianople	1d.	594. Hiogo	1½d.
534. Nisch	11d.	595. Bangkok	1d.
535. Vienna	1d.	596. Serajevo	1d.
536. Odessa	8d.	597. Copenhagen	1½d.
537. Constantinople	2d.	598. Cephalonia	½d.
538. Damascus	1d.	599. Chefoo	½d.
539. Tientsin	1d.	600. Guatemala	1½d.
540. Amoy	1d.	601. Tonga	½d.
541. Mogador	1d.	602. Tahiti	1d.
542. Vienna	1d.	603. Stettin	2d.
543. Antwerp	1d.	604. Vera Cruz	1½d.
544. Lisbon	2d.	605. Christiania	4d.
545. New York	1½d.	606. Pernambuco	1½d.
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547. Stettin	1½d.	608. Tunis	½d.
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549. Trebizond	1d.	610. Frankfort	½d.
550. Nice	1d.	611. Tabreez	½d.
551. Baghdad	½d.	612. Bilbao	1d.
552. Fiume	1d.	613. Barcelona	½d.
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No. 619.

Reference to previous Report, Annual Series No. 497.

ITALY.

ROME.

Mr. Dering to the Marquis of Salisbury.

My Lord,

Rome, October 3, 1889.

THE full statistics of Italian Commerce and appreciative comments thereon by the Director-General of Customs for the year 1888 have just been issued, and, supplementing the short report on the subject furnished to your Lordship on March 23 last, I have the honour to forward herewith a summary in translation dealing with the amounts and values of the trade in question, more especially dealing with the effect of the War of Tariffs between France and Italy on the exports and imports of the latter country.

I have, &c.

(Signed) HENRY NEVILL DERING.

Movement of Commerce in 1888.

EXPORTS.

One of the most interesting points in this publication is the exposition of the influence of the War of Tariffs on the national commerce.

Out of a total amount of imported merchandise equivalent to a value of 1,174,610,000 fr., but little over 155,000,000 fr. worth came from France, whereas in 1886, a normal year, the produce imported from that country was of the value of 311,000,000 fr. Germany and Great Britain have chiefly profited by this, as is shown in the following table :—

	Percentage of Imports.	
	1886.	1888.
Austria	15	12
France	21	13
Germany	9	12
Great Britain	19	23
Switzerland	6	5
Other countries	30	35
Total	100	100

This fact becomes more apparent when only industrial products are taken into consideration. In woollen goods France and Great Britain maintained up to the end of 1887 nearly equal proportions, viz., about 35 per cent. In 1888, however, the proportions changed as follows:—

	1886.	1888.
Austria	7	6
France	34	18
Germany	15	30
Great Britain	35	36
Switzerland	8	4
Other countries	1	6
Total	100	100

Under this head Germany has gained in proportion as France has lost, as we find silk goods from France diminished from 61 per cent. to 32 per cent., whilst those from Germany increased from 15 per cent. to 37 per cent.

Fraudulent
declarations
of origin and
destination.

Allowance must always be made in speaking of the proportion of imports from various countries for fraudulent declaration of origin, made with the object of avoiding differential duties, and, in order to test more exactly the state of trade, exports furnish a surer guide.

In 1886, out of a total value exported of 1,020,952,000 fr., exports destined for France amounted to over 445,000,000 fr., or a proportion of 44 per cent. In 1888, out of a total value exported of over 892,000,000 fr., the proportion destined for France fell to 170,000,000 fr., or 21 per cent.; whilst, on the other hand, the exports to Switzerland during those two years rose from 88,000,000 fr. to 214,000,000 fr. (from 9 per cent. to 24 per cent.).

No one can be deceived, however, by so rapid an evolution, and, if it is wished to investigate its causes, an admirable example is found under the head of the export of raw silk. It is well known that up to the close of 1887 the sale of raw silk produce almost entirely took place in the French market, destined as it was more especially to feed the industrial establishments in and about Lyons.

The recriminatory duty imposed by France merely had the effect of altering the direction of transport, hence the apparent differences, the cause of which should be generally known. The export of raw silk to France in 1886 amounted to 28,178 quintals, of a value of 169,000,000 fr., the amount and value for the previous year being almost similar. The exports to Switzerland in that year were limited to 73,000 quintals, of a value of 44,000,000 fr. In 1888 the figures were completely reversed, for while the export to France of raw silk fell to 9,188 quintals, of the value of 46,000,000 fr., that to Switzerland rose to 29,621 quintals, equal to a value of 148,000,000 fr. Silk, consequently, to the value of over 100,000,000 fr. was added to the export to Switzerland, the true destination of which was, of course, obvious.

What has happened in regard to raw silk has also, in less proportion, been the case with many other Italian products. There can be no doubt, however, of the heavy losses incurred by Italian industries, and notably by agriculture, in consequence of the insurmountable barriers erected against them by the nation, which hitherto had absorbed the largest proportion of Italian commerce.

In view of the enormous production of wine during 1887-88, Wine. the possession of such a market would have done something at all events to palliate the agricultural crisis, which has endured now for several years. The following table will give an idea of the steady diminution in the export of wine to France:—

		Quantity Ex- ported.	Export to France.	Proportion sent to France.
1883	Hectolitres ..	2,611,355	2,113,588	80 per cent.
1884	" ..	2,861,909	1,882,746	80 "
1885	" ..	1,463,602	1,099,078	75 "
1886	" ..	2,330,669	1,849,580	80 "
1887	" ..	3,582,104	2,782,707	73 "
1888	" ..	1,862,020	817,360	45 "

Further, out of this last quantity of 817,360 hectolitres, 724,775 hectolitres were exported to France in the first two months of the year, before the restrictive tariff came into operation. To be exact, it will be just to take only into account the wine exported during the last 10 months of the year 1888, which was of the amount of 950,000 hectolitres, and of this 92,585 hectolitres only, or less than 10 per cent., found its way direct to the French market.

This state of things was, however, partially alleviated by an augmented import to Germany, Switzerland, and South America, but even this has not enabled Italy to dispose of the enormous vintages of the last two years.

The next article of importance is olive oil.

France and Great Britain have invariably been the principal Olive oil. markets for this commodity. During the last three years the following were the results of the export trade to these two countries:—

(762)

A 3

	Total.	France.	Great Britain.
	Quintals.	Quintals.	Quintals.
1886	648,011	197,279	140,852
1887	640,730	237,186	121,091
1888	523,952	108,318	142,118

It will be noted that only in 1888 did the exports to Great Britain exceed those to France. This is, also, probably a result of the hostile tariff, although it does not appear to have yet seriously affected the oil trade.

The quantity exported depends primarily on the result of the harvest. Looking back, the extreme depression in this branch of commerce took place in 1885, when only 359,549 quintals were sent out of the country, whilst there exist considerable markets for oil in Russia, Austria, Germany, and America. In the first six months of the current year, for instance, the export of oils has increased by 60,000 quintals over the six months of the corresponding period of 1888; 94,694 quintals thereof going to France.

Cotton oil.

It may not be out of place here to mention cotton oil, the importation of which produced at one time strong remonstrance among the Italian producers, in consequence of which an additional duty of 14 fr. per quintal was imposed on this adulterating agent in 1881. This measure appeared temporarily successful, and its efficiency was helped by abundant harvests and the fall in prices. Following on the 98,740 quintals imported in the above year in anticipation of the new duty, the import of cotton oil almost collapsed, but 401 quintals arrived in 1882 and 6,021 quintals in 1883.

The poor harvests of 1883 and 1884, however, supervened, and as the price of olive oil went up the demand came again for the adulterating mixture, so that in the years succeeding 1883 a revival took place in that article, viz. :—

	Quintals.
1884	54,972
1885	79,421
1886	61,134

It fell in 1887 to 24,549 quintals, and in 1888 to 15,671 quintals, of which only 2,487 quintals were taxed previous to the introduction of the new tariff. Finally, up to August 1 of the current year, but 862 quintals have been imported, which tends to prove that, apart from the harvest, the action of the new tariff, which imposes a tax of nearly 30 fr. a quintal, or about 50 per cent. of its value, has had its effect in diminishing the import into Italy.

Oranges and lemons.

With regard to the orange and lemon export (agrumi) up to 1880 their weight did not annually reach 1,000,000 quintals, the average being 912,237 quintals per year. From 1881 to 1885 the average rose to 1,465,370 quintals, and in subsequent years the export was as follows :—

						Quintals.
1886	..	..	..	..	..	1,248,791
1887	..	..	..	..	..	2,298,089
1888	..	..	..	..	..	1,649,331

and we find that, in the first seven months of the current year, the trade is again on the increase, as up to that period it had already reached 1,520,084 quintals. North America consumes more than half of this branch of commerce, and then come in successive proportions the markets of Great Britain, Austria, Russia and Germany. France takes but an insignificant quantity, from 1 per cent. to 3 per cent., but the modesty of her requirements does not affect the prosperity of this purely southern, or rather Sicilian, industry. Four-fifths of this industry is carried on from Sicily, the custom house at Palermo alone registering annually over 1,000,000 quintals.

Although France, contenting herself with the rich products of Provence, does not take many of the Italian grown oranges and lemons, she is a good customer for dried fruits of all sorts. In 1886, out of a total exportation of 366,313 quintals, 97,523 quintals went to France, about an equal quantity in 1887, while the trade sank in 1888 to 28,716 quintals. Here, again, we find the harmful action of the recriminatory tariff, as the export of those fruits, for which the principal market is France, fell in 1888 to nearly 100,000 quintals below the amount exported in 1887, the figures being:—

					Quintals.
1887	..	..	..	..	422,739
1888	..	..	..	..	326,157
					96,582

The traffic in cattle continues to diminish, and this diminution is not attributable to commercial causes, but to the manner of breeding and feeding. The amelioration of this branch of industry is occupying the serious attention of the Government.

With regard to poultry, France again furnishing the principal customer, a diminution was naturally to be expected. Its proportions in the last three years were as follows:—

EXPORTS.

					Total.	France.
					Quintals.	Quintals.
1886	..	..	..	..	72,181	47,147
1887	..	..	..	..	75,261	88,951
1888	..	..	..	..	57,637	22,445

A slight amelioration is perceptible in the returns for the first seven months of 1889, viz., an increase of 2,510 quintals over the corresponding period of 1888, and it is pleasant to note that the
(762)

exports to France show in that time an increase of 6,000 quintals as compared with the first seven months of the preceding year.

Butter. Not much complaint can be made as to the export of butter, three-fifths of which up to 1888 was absorbed by the French market. In the three years 1884-86 there were exported over 30,000 quintals, a result not obtained in the two following years. This diminution has, however, now ceased, although France comes in for a smaller share than had hitherto been the case.

Cheese. Nothing can be more satisfactory than the steady increase in the export of Italian cheese, in spite of the diminished demand of France. The figures for the last four years are as follows:—

EXPORTS.

				Total.	France.
				Quintals.	Quintals.
1885	..	..	..	36,040	12,920
1886	..	..	..	39,010	11,574
1887	..	..	..	50,321	15,632
1888	..	..	..	53,541	9,433

besides an increase in the first seven months of 1889 of 9,352 quintals over the corresponding period of the preceding year.

Eggs. The export of eggs reached its highest in 1884-5, with respectively 297,753 and 288,744 quintals, successively decreasing in the following years to—

				Quintals.
1886	..	..	..	231,026
1887	..	..	..	193,769
1888	..	..	..	180,895

and this diminution is still going on, as the return of July 31, 1889, shows a decrease already of 37,000 quintals.

The tendency to diminution in the export of eggs having shown itself previous to the existing state of things, it can scarcely be entirely attributed to the War of Tariffs, as, on consulting the statistics for the current year as far as they go, there is proof of a diminution not only in the export to France, but also to Great Britain, Belgium, and Germany. The loss of the French market has, however, certainly made a difference, as is shown by the following figures:—

EXPORTED Eggs to France.

				Quintals.
1886	..	..	..	97,101
1887	..	..	..	53,708
1888	..	..	..	27,943
1889, to July 31	..	..	..	10,927

The volume under consideration proves that goods of the above nature hitherto sent to France were in part destined in transit for Great Britain. According to the return of the Director-General of Customs, scarcely any mention is made of the

export of eggs to Great Britain up to 1887, in which year they figure for 12,000 quintals. In 1888 they suddenly rise to 81,960 quintals, and up to July, 1889, to 49,306 quintals.

With regard to industrial products, the export of jute during Jute, the past few years has been as follows:—

EXPORTS.

				Total.	France.
				Quintals.	Quintals.
1886	..	..	..	329,577	102,258
1887	..	..	..	338,453	96,209
1888	..	..	..	417,158	103,530

and the diminution in the first seven months of 1889 of 43,869 quintals is principally to be attributed to the wretched crop of last year, poor both in quality and quantity.

The export of jute yarns maintains good proportions. Against Jute yarns, an average for the five years 1882-6, of 21,133 quintals, we find in—

				Quintals.
1887	..	..	..	30,844
1888	..	..	..	29,393

and, if the export to France has diminished by one half, that to Great Britain and Germany has increased in an analogous proportion, if even it cannot be considered as merely changing the route of transit.

This doubt affects equally many other branches of merchandise, such as goods made of straw, including hats, as, in spite of the small demand from France, the sale of these articles scarcely diminished in 1888.

The exports of marble have not been affected by the present ^{Marble.} tariff difficulties, whether because the bulk of the article was destined for Great Britain and the United States, or because the proportion of 10 per cent. of the whole export usually taken by France has not diminished.

The annual export of marble from Italy averages rather over 1,000,000 quintals.

The export of sulphur is in a very satisfactory condition, and, ^{Sulphur.} after the United States of America, France is the largest customer. The following figures are worthy of notice:—

EXPORTS.

				Total.	France.
				Quintals.	Quintals.
1886	..	..	..	3,008,810	548,720
1887	..	..	..	2,796,280	540,930
1888	..	..	..	3,237,896	557,204

This steady increase is maintained for the first seven months of the current year, during which an increase of 48,672 quintals has taken place, showing also a recrudescence of exports to France.

Coral.

There is no need to lay much stress on the diminution in the worked coral trade, most of which goes to India, France taking rather less than 10 per cent., the decrease being probably due to the excessive exportation of this article which took place in 1886-7.

IMPORTS.

Petroleum.

The following is the value of the petroleum imported during the last four years :—

					Francs.
1885	..	..	..	..	18,542,700
1886	..	..	..	..	12,828,240
1887	..	..	..	..	13,302,318
1888	..	..	..	..	15,369,486

The United States are the chief exporters of petroleum to Italy, but Russia also sends a large quantity.

It is only five years ago that Russian petroleum was first imported into Italy, and that only to the extent of 5,000 quintals, but it has now increased to 130,000 quintals.

Russia in 1887 gained 9·8 per cent. on 1886, and the United States lost 9·6 per cent. In 1888 the former lost 4·3 per cent., while the latter increased 3·3 per cent.

Spirits.

The importation of spirits into Italy, and the returns of the Finance Department for duty and frontier surtax, are as follows :—

				Quantity Imported, reduced to 100 deg.	Duty.
					Francs.
1887	..	..	..	26,081	4,747,807
1888	..	..	..	9,624	2,204,100

Austria and Germany supplied nearly all the pure spirit in casks. France, the spirit sweetened and in bottles.

Coffee.

The importation of coffee was smaller in 1888 than in 1887, being 140,267 quintals as compared to 142,650. The consumption has diminished latterly, as the following figures show :—

					Quintals.
1883	..	..	..	..	153,439
1884	..	..	..	..	162,839
1885	..	..	..	..	235,962
1886	..	..	..	..	108,508
1887	..	..	..	..	142,650
1888	..	..	..	..	140,267

The exceptional increase of 1885 is due to the double movement of speculation of that year, preparatory to the increase of duty from 100 fr. to 140 fr. on November 29.

On the supposition that all the excess of 1885 was carried over to 1886, the following figures may be considered as giving the mean importation:—

				Quintals.
1883-4	..	..	..	158,189
1885-6	..	..	..	172,235
1887-8	..	..	..	141,458

The last increase of the excise on coffee coincides with a period of increase in price, as from 150 fr. per quintal it rose to 210 fr. in 1888. The Italian consumer, who paid, in 1885, 1 fr. 50 c. and 1 fr. duty for every kilogramme of coffee, had in 1888 to pay 2 fr. 10 c. and 1 fr. 40 c. duty. It is, therefore, not astonishing that its consumption diminished, and that that of its substitutes increased.

The importation of sugar also felt the influence of the Sugar. speculation which preceded the augmentation of the duty, and the consumption diminished, although the prices, excise excluded, did not rise after 1888. Moreover, the excise on a kilogramme of refined sugar was raised 14·6 per cent. from 1885, and the excise of 90 francs per quintal represents about double the value of the refined sugar without the duty.

Among imports, wheat occupies the first place. A pro-Wheat. portional depression succeeded in 1888 the exceptional importation of 1887. This depression coincides with the application of the decree raising the duty on a ton of grain from 30 to 50 fr.

Signor Castorrina, by comparing the imports with the home production, has deduced the following results:—

1. That the average annual importation of grain from 1883-5 to 1886-8 increased from 393,314 tons to 868,930 tons.

2. That the home production has, during the same period, remained about the same, with the exception of the moderate harvest of last year, during which, however, there was no corresponding increase of importation.

3. That the consumption of grain between the first and second period of three years increased about 10 per cent., although the increase of population during the corresponding period was only about 2½ per cent.

Therefore, it may be said that the Italian consumption has certainly increased, but that the very large importations of 1886-7 represents only a part of the increased consumption.

Italy has also felt but tardily and slightly the action of the undoubted rise in the foreign markets; in consequence either of the abundant reserve of grain in stock, which has sufficed to supply the deficiency in the harvest, and has rendered further importations charged with a new duty of 5 fr. per quintal superfluous, or in consequence of the greater consumption of the substitutes for wheat caused by the unfavourable economic situation.

The importance of raw material for the Italian industries is Raw material specially great. All raw material imported is free of duty, with and manufac- the exception of pig iron (1 fr. per quintal), copper (4 fr. per quintal) and lead (50 c. per quintal). tures.

The principal items of other raw imports are coal, the value of which, in 1888, was 89,076,815 fr.; raw cotton of the value of 70,942,580 fr.; wood for building of the value of 30,821,735 fr.; wool of the value of 23,906,260 fr.; raw hides of a value of 21,938,220 fr.; scrap iron of a value of 11,519,970 fr.; and various items for dyeing and tanning purposes worth 5,324,704 fr., &c. These items, together, represented in 1888 the value of 293,558,468 fr., showing a decrease, as compared to 1887, of 73,041,707 fr.

The largest proportion of this is taken up by the entry of wood for construction, and pig iron, viz. :—

				Wood.	Iron.
				Fr.	Fr.
1886	..	..	..	59,125,275	5,266,780
1887	..	..	..	82,228,815	16,208,290
1888	..	..	..	30,821,735	6,269,431

Wood.

The large increase in the import of wood in 1887 is due to the influence of the Italo-Austrian treaty of commerce.

The exemption from duty enacted in 1878 was re-enacted in 1887; the excessive supply of wood laid in before the conclusion of the treaty reacted on the supply of 1888. The diminished importation of wood is also in part due to the building crisis, which, to a certain degree, explains the smaller importation of building-stone (6,000,000 in 1887, and 1,500,000 in 1888).

Pig iron.

The great difference in the value of the importation of pig iron is sufficiently explained by the fact that up to February 25, 1888, there was no duty on it, and that from the time the new tariff was published until it became law, the manufacturers had ample time to lay in a stock large enough to suffice for a considerable period.

Coal.

The increase in the importation of coal has been large, as it has risen in value in the last three years from 67,000,000 to 82,000,000 and 89,000,000 fr.

The duty on copper and lead in pigs was not raised in the new tariff, and the great increase in the price of copper from 1886 to 1888 was due to the enormous speculation, which artificially raised the price of the metal during that period.

The variations of more or less importance in other commodities are of no special significance, being due to ordinary and natural causes.

Manufactured goods.

Yarns and tissues constitute a principal part of Italian imports, and represent a value of 196,000,000 fr.

Linen, hemp, jute.

Modifications of a certain importance were introduced into the tariff of July 14, 1887, respecting the manufacture of cotton, and even more so of wool and silk. On the other hand, thanks to a clause in the final protocol affixed to the Treaty of Commerce with Austria-Hungary of December 7, 1887, the duty on linen yarns, linen tissues, hemp and jute, remained almost unchanged.

The importation of these goods during the last two periods of five years, was :—

	1879-83.	1884-88.
	Quintals.	Quintals.
Linen and hemp yarns ..	53,261	65,189
Jute yarns	7,751	7,470
Linen and hemp tissues	12,335	8,950 *
Jute tissues	18,465	14,585

The jute industry has largely developed in Italy; the value of the jute tissues exported in 1888 being 461,000 fr., as against 194,000 in the preceding year.

During the last 10 years the importation of cotton yarns has continually declined.

The increase of the average taxes paid up to 1887 show that the national spinning industry has gradually increased, so as to supersede the import trade except as regards the higher qualities, the notable difference in the average duty paid in 1887 and in 1888 is chiefly due to the new customs regulations.

The importation of cotton tissues has not decreased in the same proportion as yarns; but notwithstanding the increase of population, and the increased demand for cotton goods, the price of which has declined year by year, the import trade therein has remained stationary or increased very slightly.

Wrought iron constitutes an important item in Italian import trade. In 1888, 2,032,071 quintals were imported, 463,742 quintals having been imported during the first two months of the year, during which the old duty was in force.

The total importation was remarkable for the quantity of rails imported to be used in the Italian military railways. The increase in the importation of wrought iron shows that the home industries are progressing, the more so as it is accompanied by a considerable increase in the demand for coal, for scrap iron, and steel, and raw iron to serve as material in the native workshops.

The importation of machinery has increased. In 1888 it was higher than in any other year except 1885; and this in spite of the extra amount purchased in 1887 on account of the impending change in the tariff. During the first six months of 1889, 187,734 quintals were imported, a fact which indicates a by no means inconsiderable industrial movement.

The importation of spinning and weaving machinery was most noteworthy. During the first two months of the current year 15,581 quintals of spinning machinery were imported, being almost as much as during the whole of 1888; 22,321 quintals of weaving machinery was imported, as compared with 31,108 quintals in 1888.

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No. 633.

Reference to previous Report, Annual Series No. 388.

ITALY.

ROME.

Consul Franz to the Marquis of Salisbury.

My Lord,

Rome, November 15, 1889.

I HAVE the honour to transmit to your Lordship, herewith enclosed, a Report upon the present Condition of the Building Undertakings in Rome, and of Municipal Finance, as well as on the Trade, Shipping, Population, Public Works, etc., of my District for the year 1888.

Wishing to embody in one Report this latter information with the more interesting subjects connected with the local state of affairs, I was obliged to postpone for some time the transmission of this Report owing to the particulars, that were at my disposal, being deficient in many points which have been cleared up by quite recent publications.

I have, &c.

(Signed) ALEX. ROESLER FRANZ.

Commercial Report for the Year 1888.

THE ROME BUILDING CRISIS AND HOUSE PROPERTY IN ROME.

A commercial report for Rome must at present deal chiefly with the local building crisis, the most salient features of which were pointed out in my Report for 1887 (388). Two main questions still demand a solution: the first is, whether the crisis has as yet reached its climax, and whether it is on a fair way of resolving itself; the second question is, what will be the immediate consequences that may arise from such an abnormal state of things as regards the building speculations afloat.

This important subject has been examined with great competency by the Local Chamber of Commerce. It has also been diffusely entered upon in the Annual Reports of such of the Institutes of Credit as are more intimately connected with the building operations of the capital of the kingdom. The crisis is naturally the subject of frequent discussion amongst the press, but, so far,

Official
information
connected
with subject.

the conclusions arrived at are more or less a matter of opinion. Fortunately much information of an official character has recently come to light, and this will enable us to form a safer criterion of the actual state of matters.

I, therefore, consider the present moment a suitable one for me to set forth in this report some facts and figures, the veracity of which I have not the least reason to doubt, which appear to me sufficiently clear and of a conclusive character.

Capital
employed in
new buildings.

From a very able study of the Director General of Statistics of the kingdom on the state of buildings in Rome, in the year 1888, it appears that—without reckoning what had been done during the years previous to 1882, since January 1, of this latter year, in which the extension and renewal of Rome was taken up on a much larger scale owing to the combined action of the government and of the municipality, till March 31, 1888—the capital employed in the building of houses may have amounted to 364,000,000 lire (14,560,000*l.*). This includes such edifices as were built at the expense of government, of the municipality, and of other public administrations. If we do not include the latter edifices, the sum expended is calculated at 274,000,000 lire (10,960,000*l.*).

It should be noted that, in the above figures, the cost of the ground and the expenses incurred for the refitting of old houses are not included.

Mortgage
banks, loans
on house
property.

A great portion of the said capital was supplied through the mortgage banks. Their credit for operations made in Rome amounted at the end of 1887 to 156,000,000 lire (6,240,000*l.*), and at the end of 1888 it may be calculated to have reached 190,000,000 lire (7,600,000*l.*).

Valuations.

The said banks operate in various manners, but the loans they grant are exclusively on security (mortgage) of houses or lands unburdened by any previous mortgage. The houses are to be entirely constructed and rendered habitable. The amount of the loan never exceeds half their value as per valuation. The system followed in the valuation of houses is this: they first ascertain the exact income yielded by each house, from that they deduct the taxes and a percentage for eventual losses. This system is also followed when, instead of a loan, it is proposed to sell a house or other landed property. Thus the purchaser is able to ascertain as approximately as possible at what interest he is going to invest his money. The property of the ground and house is generally absolute and perpetual. The "provenance" and title are easily and unquestionably ascertained by means of the Cadastre and mortgage records. The bonds that the said banks issue to the amount corresponding to the loans granted are to some extent placed in Italy, therefore, such being the case, if on the one hand they constitute a debt burdening property, on the other hand they represent native capital owned by the possessors of such bonds.

Bonds.

Interest
yielded by
bonds.

Their market is well enough sustained, notwithstanding that the maximum of interest which they yield is 5 or 5½ per cent. and the minimum interest is 4½ per cent.

THE following Table will show the Quotations of Mortgage Quotations of
Bonds at various periods from January, 1888, to September 30, bonds.
1889:—

	Nominal Value.	Jan. 1, 1888.	June 30, 1888.	Dec. 31, 1888.	June 30, 1889.	Sept. 30, 1889.
Banca Nazionale (4 per cent. net)...	Lire. 500	Lire. 469	Lire. 473·50	Lire. 475	Lire. 482	Lire. 483
" " (4½ " ")...	500	...	...	502	502	505
Banco S. Spirito 5 per cent., (net 4½ per cent.) ...	500	466	461·25	465	466	477*
Banco di Napoli, 5 per cent. (net 4½ per cent.) ...	500	500	...	500	500	480
Società Immobiliare (5 per cent. net) ...	500	500	502	498	495	485
Società Immobiliare (4 per cent. net) ...	250	280	225	225	215	203

* Including coupons payable October 1, 1889.

The average cost for building a house of five or six floors in Rome is calculated at 364 lire (14*l.* 11*s.* 2*d.*) per square metre of covered area, and the average cost of each room at 2,000 lire (80*l.*), as stated in my Report of November, 1883. During the period between 1870 and 1881 the available rooms in new houses, or added to old ones, amounted to 155,980 (annual average 12,998), and from 1882 to the end of 1887 they amounted to 137,000 (annual average 22,830). This would represent a capital of 312,000,000 lire (12,480,000*l.*) during the former period, and of 274,000,000 lire (10,960,000*l.*) during the latter period.

As a natural consequence of the crisis a large stock of building materials remained on hand, and they necessarily underwent a sensible abatement in price which ranged from 15 to 22 per cent. This has lowered somewhat the cost of house building since 1887. It is worthy of remark however, that workmen's wages did not undergo any abatement.

As regards the cost of building ground some information was furnished by me in my Reports, Nos. 149 and 388, Annual Series. From the information now published it appears that the highest price for building ground was realised during the years 1887 and 1888. The following are a few instances of prices of building ground fetched during the above years for areas situated in different parts of the town, resulting from real transactions concluded :—

Cost of building ground.

Per square metre.

Via Cavour	from 200 lire (8 <i>l.</i>) to 220 lire (8 <i>l.</i> 16 <i>s.</i>).
Corso Vittorio Emanuele ..	320 lire (12 <i>l.</i> 16 <i>s.</i>) to 327 lire (13 <i>l.</i> 10 <i>s.</i>).
Via Arenula	238 lire (9 <i>l.</i> 10 <i>s.</i>) to 272 lire (10 <i>l.</i> 17 <i>s.</i>).
Via Labicana	125 lire (5 <i>l.</i>).
Villa Ludovisi	110 lire (4 <i>l.</i> 8 <i>s.</i>) to 130 lire (5 <i>l.</i> 4 <i>s.</i>).
Prati di Castello	185 lire (5 <i>l.</i> 8 <i>s.</i>) to 150 lire (6 <i>l.</i>).
San Cosimato	180 lire (5 <i>l.</i> 4 <i>s.</i>).
Porta Pia (outside)	32 lire (1 <i>l.</i> 5 <i>s.</i> 7 <i>d.</i>).

Some sites placed in a very central position fetched as much as 1,000 lire (40L.) per square metre.

Since the crisis broke out the sale of building ground was suddenly checked, and that situated in out of the way places

(783) checked on account of crisis.

A 3

No
considerable
depreciation.

underwent an enormous depreciation. It is, therefore, difficult to indicate at present the market value of building ground, but, although there is no longer a run for it, and fanciful prices cannot be realised, there is no symptom manifest that any considerable depreciation has taken place in the average for the above-mentioned localities except the last one (Porta Pia), and in other localities situate within the circle of a normal and reasonable expansion.

I find, in fact, that the following prices were realised at public competitions or by private agreements:—

	Per square metre.
In November, 1888, in Via Arenula close to the Ponte Garibaldi	370 lire (14 <i>l.</i> 16 <i>s.</i>).
In December, 1888, area of the Piombino Palace in Piazza Colonna	725 lire (29 <i>l.</i>).
" Porta Pia " " " Bonaparte Villa close to the	" " " "
" " " " " " " " " "	150 lire (6 <i>l.</i>).
More recently, at the Prati di Castello, a large area	120 lire (4 <i>l.</i> 16 <i>s.</i>).
" " " " " " " " " "	100·72 lire (4 <i>l.</i> 0 <i>s.</i> 6 <i>d.</i>).

Incomes
yielded by
houses rose
till 1887.

It is a remarkable fact that, during the period when the building fever was at its highest pitch (between 1882 and 1887), the income yielded by houses went on rising in every part of Rome. The increase of course differed with the different localities. On an average it results that from 1880 to 1887 the increase was from 17 to 37 per cent. on previous incomes.

House rents
not lower now.

There is reason to state that since the above period house rents did not go down, I mean as regards ordinary buildings not in out-of-the-way places; although landlords will be more cautious, they must improve the conditions of dwellings, sanitary or otherwise, and cannot raise their demands at the renewal of the contracts.

Revision of
rental for
taxation
purposes.
Higher rental
in Rome
expected.

However, as a general revision of incomes yielded by houses has been decided upon for taxation purposes, making it binding on landlords to produce the actual contracts—and it is expected that the total rental of houses in Rome will thereby be elevated in a notable manner—it may be doubted that, as it generally happens, the tenants can be made to bear the burden by a corresponding increase of rent.

Terms of
leases.

Leases are generally made out for three years and the law affords sufficient protection to landlords for the carrying out of all and each of the clauses of the agreement without much risk of litigation.

Rate of house
rents.

The rate of house rents may be calculated as follows:—for an apartment of six rooms, including kitchen, good staircase, a suitable entrance, and a sufficient supply of drinkable water.

1. In the vicinity of the Corso, Via Nazionale, and other principal thoroughfares, the price varies from 150 lire (6*l.*) to 200 lire (8*l.*) per month. The cost of apartments in houses of a more elegant appearance is much higher.

2. In the new quarters of the Macciao from 90 lire (3*l.* 12*s.*) to 120 lire (4*l.* 16*s.*).

3. On the Esquiline from 75 lire (3*l.*) to 90 lire (3*l.* 12*s.*).

4. In the quarters inhabited by workmen the price of a room is 9 lire (7*s.* 6*d.*) per month; and in houses also inhabited by workmen but more central 12 lire (9*s.* 7*d.*).

Wishing to establish a comparison with the rents of other Italian towns and of some foreign cities, habitations have been divided into three categories:—

Comparison
with other
towns in
Italy, &c.

The first category of such houses as are placed in central positions occupied by the higher classes.

The second category of those habitations which are placed in localities distant from the centre of the town, or that are situated in secondary streets, occupied by the middle classes.

Finally, the third category of those habitations that are placed in the quarters inhabited by workmen as well as those that are placed in the unfrequented parts of the town. The top floors have also been aggregated to the third category.

The results arrived at for the year 1888 were the following, taking for standard apartments of six rooms:—

Average
for every
room.

ITALY.

Town.	Average yearly rent for every room.									
	1st Category.			2nd Category.			3rd Category.			
	Lire.	£ s. d.	£ s. d.	Lire.	£ s. d.	£ s. d.	Lire.	£ s. d.	£ s. d.	£ s. d.
Rome	800 to 400	12 0 0	to 16 0 0	180 to 240	7 4 0	to 9 12 0	100 to 150	4 0 0	to 6 0 0	4 0 0
Naples	300	12 0 0	0 0	200	8 0 0	0 0	115	4 12 0	0 0	8 0 0
Milan	250	10 0 0	0 0	120	4 16 0	5 8 0	85	100	4 0 0	4 0 0
Turin	186	7 8 0	13 12 0	125	5 0 0	5 8 0	90	110	4 8 0	4 8 0
Genoa	200	8 0 0	8 0 0	120	4 16 0	6 8 0	90	110	4 8 0	4 8 0
Florence	..	..	..	80	3 4 0	0 0	45	1 16 0	0 0	4 8 0
Venice	145	5 16 0	..	120	4 16 0	0 0	60	2 8 0	3 12 0	3 12 0
Paris	500	20 0 0	21 16 0	300	12 0 0	18 0 0	..	..	..	..
Marseilles	..	..	..	135	5 8 0	0 0	..	..	..	..
Brussels	..	..	..	125	5 0 0	6 0 0	..	..	..	..
Berlin	450	18 0 0	..	300	12 0 0	14 0 0	200	8 0 0	10 0 0	10 0 0
Trieste	240	9 12 0	10 0 0	140	5 12 0	6 16 0	90	3 12 0	4 0 0	4 0 0

From the above one may perceive that house rents in Rome are much higher than in the other principal towns in Italy where there is also an increase of population and a development in house building, except Naples, and from that fact it may be concluded that there is still a wide margin for profit on buildings in Rome, even if house rents should lower to a more equalising level. This would enable most of the inhabitants to live in more spacious habitations, whilst at present they are obliged to put up with narrow space, and the population is thus excessively crammed. It is, however, not to be expected that house rents in Rome will go down to the same level as those of the said other towns in Italy, inasmuch as the cost of building is more expensive in Rome.

Rents in Rome higher than in other Italian towns

Judging from the receipts of the chief Government taxes up to 1888, it does not appear that the building crisis has affected such taxes. As regards the tax on buildings, the non-diminution of the proceeds thereof is explained by the fact that the houses involved in the crisis were those that were not yet completed and which, in consequence, did not appear on the tax-roll. The tax is only assessed when the buildings are completed and rendered inhabitable, and it is levied after a period of two years.

Government taxes not affected by crisis.

The following are the proceeds of the Government taxes in Rome, starting from 1884 up to 1888:—

	Years.				
	1884.	1885.	1886.	1887.	1888.
	£	£	£	£	£
Building tax	334,020	344,035	352,773	361,218	376,633
Income tax	386,473	398,691	452,907	489,849	544,314

	Financial Years.			
	1884-85.	1885-86.	1886-87.	1887-88.
	£	£	£	£
Stamp duty	224,772	229,465	263,142	303,401
Registration	239,423	277,089	396,752	381,385
Sundry registration fees	39,186	65,270	64,865	70,522
Succession duty ..	50,486	35,473	78,759	61,656
Mortgage fees	22,951	29,577	47,193	50,496

The ensuing are the returns concerning octroi duties on alimentary substances and other goods brought into Rome, which may be considered as the surest gauge to ascertain the economical conditions of the place:—

Octroi duties

1884.	1885.	1886.	1887.	1888.
£ 552,000	£ 587,200	£ 638,960	£ 728,400	£ 624,000

The proceeds of this year (1889) point out a slight increase on those of 1888.

Comparison
with previous
year.

If we draw a comparison between the proceeds of the octroi duties for 1888 with those of the previous year on some of the chief articles, we find:—

1. That there was an increase on wine of $\frac{1}{6}$; on oxen and veal, $\frac{1}{8}$; on cheese, eggs, fish, on mineral oil $\frac{1}{10}$; on burning wood, coals (including coke), and on fodder.

2. There was a diminution on alcohol, on beer, pork, porcelain, on flour $\frac{1}{8}$; on rice, vegetables, sugar, vegetable oil $\frac{1}{4}$; on coffee and oats.

3. A heavy falling-off is noticeable on articles connected with the building trade; lime and cement suffered a diminution of $\frac{1}{5}$; bricks, $\frac{1}{3}$; pazzolona, $\frac{1}{3}$; carved marble, $\frac{1}{7}$; timber, $\frac{1}{2}$; wooden articles, $\frac{1}{4}$; iron beams, $\frac{1}{3}$. There has been, however, a small increase on marble slabs for stairs, and for other finishing purposes in buildings.

Statistics of
population
further on.

As regards the statistics of the population some recent information will be found further on, as well as some details concerning the financial situation of the municipality of Rome, which is intimately connected with the progress of the building operations.

Demolitions
progressing.

So far the demolition of old houses and the other works undertaken by the municipality have proceeded regularly. For this reason, and on account of the increase of population, many of the houses recently built in new quarters of the town have already been occupied. Other buildings have been completed, whilst at the same time the renewal of the old portion of the town was progressing with alacrity.

New quarters.

The new quarters of more recent construction which answer best present requirements, are those situated in the Prati di Castello, where the new palace or courts of justice are being erected, and the Salaria and Ludovisi quarters. The latter are easily accessible, and are becoming very desirable and healthy quarters to live in. The Testaccio and S. Cosimato quarters are intended for workmen.

Scarcity of
circulating
capital.

However, the scarcity of circulating capital hinders the house trade, and capital for permanent investments, notwithstanding that good bargains are offered, is not forthcoming. Investors expect to buy at lower prices, therefore the market price of house property is poorly sustained, and as a natural consequence, capital, which has been employed in building speculations, remains entangled, to the great detriment and serious risk of the banks and firms engaged in that line of business, excluding, of course, mortgage banks who operate by means of mortgage bonds.

A proof that the increase of buildings, if contained within a normal and reasonable compass, may answer to real wants is afforded by the following fact:—One of the banks most seriously involved in the building speculations found themselves, recently, in such a critical financial situation, that they were obliged to suspend payments, and to appeal to the Banca Nazionale for help. After examining the position of affairs the Banca Nazionale consented in granting, with Government a willing party to the transaction, the important sum of 40,000,000 lire (1,600,000*l.*) as a loan, in order that some of the buildings which had been commenced, both in Rome and Naples, might be brought to completion.

Matters, I think, would soon mend if a supply of fresh capital were at hand for investment in finished and inhabited houses, such, I repeat, as are situated within reasonable limit.

The increase of public wealth in Rome since 1870, solely connected with house property and building transactions, has been enormous, and in comparison with it the debts contracted by the municipality in order to carry out those schemes which have produced such an increase of wealth are thrown in the shade. There has been considerable capital flowing in from many directions: State, private, and Church; and in connection with the latter I shall allude to the numerous religious communities, old or new, of both sexes, which have attracted or brought in capital from abroad to erect churches and convents. Nevertheless, as regards circulating capital, local circumstances and the present financial condition of Italy are such that depression is still prevalent; nor is there any sign manifest of an approaching revival of business, whilst the feeble power of resistance of the market is placed to the direst test.

The following table giving the quotations at the Rome Exchange of the principal local securities is in itself an eloquent instance of the state of the market:—

A TABLE showing the Value of Stocks and Shares at the Rome Exchange on December 31, 1888 (compared with the same date of the previous year), and on September 30, 1889.

	Capital.	Paid in.	1888.	1887.	Difference.	September 30, 1889.
	Lire.	Lire.	Lire.	Lire.	Lire.	Lire.
Italian 5 per cent. rente ...	100	100	97'80	98	— 0'40	94'37½
Rome 4 per cent. bonds ...	500	500	470	485	— 15	460
Roman Bank ...	1,000	1,000	1,170	1,180	— 10	1,088
Banca Generale ...	500	250	656'50	682	— 25'50	556
Società di Credito Mobiliare	500	400	890	1,020	— 130	618
Società Immobiliare*	500	500	885	1,275	— 885	615
Banca di Roma ...	500	250	756	830	— 74	720
Banca Tiberina*	200	200	375	503	— 128	140
Banco Industriale e Com- merciale* ...	500	500	568	669	— 101	495
Banca Provinciale* ...	250	250	250	270	— 20	...
Acqua Marcia Company	500	500	1,810	2,185	— 375	1,560
Gaz Company...	500	500	1,400	1,870†	— 470	1,150
Fondaria Company ...	250	250	200	236	— 136	90
Molini e Magazzini .	250	250	312	270	+ 42	260
Materiali Laterizi*	250	250	320	380	— 60	255
Tramway Omnibus ...	250	250	310	250	+ 60	205
Metallurgica Italiana	500	500	600	...	...	500

The prices of mortgage bonds have been given in a previous paragraph.

* Chiefly connected with land and building speculations.

† In February, 1888, the option was declared for new shares issued at par in the proportion of two new shares for five old ones.

DIVIDENDS paid for 1888 by the following Companies.

Roman Bank ..	10	lire net besides interest at 5 per cent. net.
Banca Generale ..	12'50	" " 5 "
Società Immobiliare ..	20	" " 6 "
Banco di Roma ..	2'50	" " 5 "
Banca Tiberina ..	14	" " 5 "
Acqua Marcia Company	56'70	" " 5 "
Gaz Company ..	65	" " 5 "

Rate of discount in 1888, 5½ per cent.

British capital
invested in
Roman bonds.

I have deemed it expedient to enter fully into these facts in the present report, because, besides the general interest which may be attached thereto, I have reason to believe that British capital invested in Roman bonds and securities of different kinds, with or without the guarantee of Government, represents a good round sum, which may in time still increase should British capital find its way to this market for investments of other descriptions.

POPULATION.

Increase of
population.

Number of
inhabitants.

During the year 1888 the increase of population continued to be in about the proportion stated in my last report; in fact, the returns for 1888 show an increase of 18,071 inhabitants. The yearly average for the years 1885 to 1888 was, therefore, 19,099 inhabitants. Up to December 31, 1888, the Municipal Office returned the population at 401,044. Up to June 30, 1889, it was returned at 407,936. It should be noted that the Municipal Office keeps on record only the changes referring to the permanent population of Rome, therefore a great part of the workmen that come to Rome in search of employment in the building line do not appear in the Municipal returns of population. The garrison is, however, included, and on December 31, 1888, the officers and men constituting the same amounted to 12,310. On June 30, 1889, they amounted to 11,493.

During 1888 the number of births and deaths was the following: Births 12,336, deaths 10,293. Births and deaths.

To show that the healthiness of Rome, as well as the physical power of its inhabitants is undoubtedly improving, the fact is recorded that during the latter years the proportion of births to the total number of inhabitants is on the increase, whilst the proportion of deaths in respect to births is lessening, as appears from the following tabular statement:— Healthiness of Rome improving.

Year.	Births.	Deaths.
1871.. ..	6,602	7,593
1872.. ..	6,940	9,924
1873.. ..	7,201	8,479
1874.. ..	7,484	8,693
1875.. ..	7,684	9,376
1876.. ..	7,544	9,563
1877.. ..	7,553	8,475
1878.. ..	7,712	8,429
1879.. ..	7,987	8,694
1880.. ..	7,629	10,588
1881.. ..	8,582	8,225
1882.. ..	8,580	7,933
1883.. ..	8,816	8,510
1884.. ..	9,555	8,728
1885.. ..	9,872	8,599
1886.. ..	10,484	9,297*
1887.. ..	10,641	11,987*
1888.. ..	12,336	10,293

* Including deaths by cholera.

THE MUNICIPALITY OF ROME—PUBLIC WORKS, FINANCE.

The Municipal Administration foreseeing that by next year the loan guaranteed by Government of 150,000,000 lire (6,000,000*l.*), wherewith they were so far able to meet the expenses connected with the execution of the “Piano Regolatore” (an officially approved scheme for building improvements and appropriations within a limited number of years) and other undertakings, which have been rendered necessary in consequence of the development of the town beyond the provisions of the said “Piano Regolatore,” will be exhausted—have deemed it expedient to sum up in an extensive report what has been done in the course of the last seven years, that is to say, since a convention with Government was entered upon affording a certain amount of State aid, which was the first stimulus given to the transformation, or, so to say, to the rebuilding of old Rome, and to its further development. Municipal report.

In the said report it is also stated what remains to be done of an urgent character. “Piano Regolatore.”

I find that between the edifices which, in force of the said convention, the Municipality have undertaken to erect on behalf of the Government (Palace of Courts of Justice, Palace of the Sciences, polyclinic and military hospitals, barracks, and drilling-ground) to the extent of 30,000,000 lire (1,200,000*l.*), and the other special works of a municipal character for which a separate Edifices for Government use.
Works of municipal character.

Total expenditure. account is kept, being connected with the guaranteed loan, their obligations are calculated to amount to 275,000,000 lire (11,000,000*l.*), of which 153,000,000 lire (6,120,000*l.*) have already been paid by past budgets or secured in the budget for 1889, and partly in that of 1890. The remaining 122,000,000 lire (4,880,000*l.*) will have to be charged to the budgets of 1890, and those of ensuing years.

Indemnities for expropriations. The heaviest expenses that the commune has had so far to encounter in executing the works having a municipal character are the indemnities paid for expropriations of houses and lands, which indemnities represent 80 per cent. of the total expenditure.

Future obligations. The future obligations of the commune represented by the said amount are not limited to the works in course of construction, some of which, according to stipulations concluded with Government, are to be completed by the year 1893; but extend to others not yet commenced, and which are considered of absolute necessity to the town. However, these are not even the whole of those devised by the "Piano Regolatore," the completion of which under present circumstances will be put off to a later date.

Assets reducing outlay. Against these future outlays of the commune there are some assets amounting to about 12,000,000 lire (480,000*l.*), which are to be realised by the sale of grounds, &c. Therefore, the sum actually required is thus reduced to 110,000,000 lire (4,400,000*l.*).

State aid demanded. The commune feels powerless to raise further sums on its own resources, and an appeal is being made for further State aid.

Summary of works, partly completed. The following is a general summary of the special works to which the above figures refer:—

	£
Ponte Garibaldi*	150,000
Ponte Margherita†	100,000
Palace of Fine Arts*	70,000
Two suburban bridges†	50,000
Demolition of the Ghetto (Jews quarters)*	178,000
Sewage†	270,000
Water supply†	185,000
Modifications to Via Nazionale	50,000
Corso Vittorio Emanuele†	1,030,000
Cattle market†	87,000
Viale del Re, leading to new station	150,000
Public markets	40,000
New streets within the city (about one half*)	3,070,000
Gardens†	16,000
Tunnel under the Quirinal	160,000
Porticos along the Tiber embankment	350,000
Arrangement of streets, leading to Tiber embankment	1,320,000
Bridges, besides those above mentioned†	540,000
Arrangement of new quarters within the city, including those situate at the Prati di Castello†	1,210,000
Ditto, suburban quarters†	78,000
Road called "Corso d'Italia" and suburban roads†	210,000
Public promenades†	200,000
Additional works and general expenses	238,000
	9,800,000
Plus the works which the Commune is doing on behalf of Government as already stated	1,200,000
Total	11,000,000

* Already completed.

† In course of completion.

In order to justify the onerous character of these obligations, the municipal administration observe in their report upon the subject that the building transformation, which became an imperious necessity on account of the increase of population and of the fresh wants of the city, necessitated the adoption of new plans not at first estimated, and consequently not included within the limits provided by the loan of 150,000,000 lire (6,000,000*l.*).

Onerous character of obligation.
Reason given.

They further point out that "the most onerous portion of the work which fell to their lot was the sudden and unforeseen springing up of new quarters. To this they were unable to oppose any legal impediment, because the law does not guarantee the commune from the legal consequences that may ensue by their denying or retarding the approval of the plans of new buildings; and once that a new quarter has sprung up they are bound to pave the streets, lay down sewers, provide the necessary supply of water, and the means of illumination."

Unforeseen building development.

Besides all this the commune had also to suffer "the consequences of the insane speculation deriving from the sale of suburban grounds. These were bought up by speculators and sold out in small lots at exaggerated prices to persons having very little or no capital at their disposal, the speculators making the purchase easy to them by granting long terms of payment of their debt. The purchasers were, however, bound to build houses by means of money lent by the vendors. This system proved a stimulus to numbers of adventurers who, ignoring the most elementary rules of business, tried in this manner to make a fortune. Thus an artificial development of distant quarters was started, and the first economical hitch provoked the serious building crisis whose effects are still felt and bitterly deplored."

Insane speculation on suburban ground.

Artificial development.

The sixth series of the above-mentioned loan of 150,000,000 lire was issued in April 1889, for a nominal value of 27,000,000 lire (1,080,000*l.*), at the rate of 466.25 lire (18*l.* 13*s.*) for every bond of 500 lire (20*l.*), that is say at 93 $\frac{1}{4}$ for every 100 lire. These bonds are guaranteed by Government in accordance with the law of July 8, 1883. They yield a clear interest of 4 per cent. (being equivalent to 4 $\frac{1}{4}$ per cent. on the price of issue, not calculating the profit on reimbursement) payable in gold, also abroad. The principal of 500 lire, to be paid out in gold at par by annual series, drawings to begin from 1900.

Municipal loan, issue of sixth series.

These bonds are now quoted at 460 lire in Rome. Another series, the last one, remains to be issued.

Bonds quoted at.

The budget of the commune being burdened with the interest and with the sinking of debts is unable to bear even the ordinary expenditure, and for next year the estimates fall short of 6,000,000 lire (240,000*l.*) It is, therefore, impossible to burden it with fresh items of expenditure for carrying out what remains to be done for the completion of the works above alluded to. The municipal administration look upon State aid not only for the continuation of those schemes, but also for balancing their budget, on the ground that the development of Rome is to be considered as an undertaking of a national character.

The budget of the Commune.

Deficit.

State aid looked upon as indispensable.

Municipal
taxes higher
in Rome.

As to having recourse to new taxes, it is a matter of great difficulty, and no considerable relief. The Municipal Council are reluctant to give their assent, nor would fresh taxes help much in balancing the budget, the inhabitants of Rome being already taxed for municipal taxes in a much higher proportion than that of other principal towns in Italy.

Rate of octroi
duties for
each inha-
bitant.

The following figures show what is the proportion for each inhabitant in one year for octroi duties in Rome, and in some other Italian towns:—

				Lire	c.	£	s.	d.	
Rome ..	..	..		33	89	(1	11	1)	for each inhabitant.
Genoa ..	..	..		39	52	(1	4	5)	"
Turin ..	..	..		20	14	(0	16	1)	"
Milan ..	..	..		15	61	(0	12	5)	"

Rate of all
municipal
taxes.

And the whole communal taxes amount to:—

				Lire	c.	£	s.	d.	
Rome ..	..	..		59	89	(2	7	10)	for each inhabitant.
Genoa ..	..	..		46	99	(1	17	7)	"
Milan ..	..	..		33	07	(1	6	5)	"
Turin ..	..	..		30	47	(1	4	4)	"

Offices of the
commune.

The following table shows what offices the commune is called upon to perform, and what amount of expenditure burdens its ordinary budget:—

	1889.	1890.
	£	£
Liabilities affecting municipal property and interests on debts	415,047	474,978*
Expenses of administration	119,300	126,567
Sanitary police and hygiene	165,513	164,205
Police	32,701	33,829
Public works, others than those connected with the "Piano Regolatore," and the additional schemes not included in the ordinary estimates, as well as illumination	329,210	271,055
Primary instruction	104,773	106,829
Charities	84,692	65,510
Sundry services	41,210	15,182
Special accounts	282,447	282,084
Total	1,574,893	1,540,239

* Increased over 240,000*l.* since 1886.

Official
inquiry
decided upon.

This state of things, both as regards the expenditure for public works and the ordinary budget, has necessitated the severe measure, just adopted by the Government, of proceeding to an inquiry on the past administration, and on the financial condition of the Municipality of Rome; by the results of which the Government may be guided in deciding whether, and to what extent, the State should come to its aid.

ADDITIONAL REMARKS.

On January 1, 1888, the credit of depositors in the Roman savings bank amounted to 69,000,000 lire (2,760,000*l.*), represented by 63,000 deposit books. On December 31, of the same year, deposits amounted to 74,000,000 lire (2,960,000*l.*), represented by 65,655 deposit books, thus showing an increase in the deposits of 5,000,000 lire (200,000*l.*).

Rome savings bank.

Amongst the investments of this bank, I find that the sum of 41,000,000 lire (1,640,000*l.*) have been lent on the security of houses or land (mortgages) on the sinking system of ten years duration.

This bank, which originally started with a capital of 1,000*l.*, has at present a reserve fund of nearly 400,000*l.* The latter sum represents 13½ per cent. of the amount of deposits.

The credit of depositors in the post-office savings bank amounted, on December 31, 1888, for Rome only, to 14,290,767 lire (571,630*l.*), represented by 98,391 deposit books; and, for the province of Rome, to 3,678,444 lire (147,137*l.*), represented by 32,285 deposit books, whereas, on December 31, 1887, they amounted respectively to:—

Post-office savings bank.

	Lire.	£	Deposit books.
Rome	13,432,693	=537,307	88,357
Province of Rome ..	3,540,541	=141,621	29,539

Showing thus an increase in 1888 over the preceding year of:—

	Lire.	£	Deposit books.
Rome	858,074	=34,323	10,034
Province of Rome ..	137,903	= 5,516	2,746
Total	995,977	=39,839	12,780

From some statistical records published by the General Direction of statistics regarding the prices of alimentary substances, embracing a period of 26 years, from 1862 to 1887, it appears that, as regards articles of primary necessity, meat excepted, the falling in price has been very considerable. The abatement on the price of cereals dates from 1880, and, as regards wheat and Indian corn, since 1884 they went lower than has been the case for a great many years, so much so that the prices for 1887 show an abatement of 41 per cent. on wheat and 50 per cent. on Indian corn on the maximum prices of former times. For rice the abatement was 24 per cent.

Prices of alimentary substances.

Fall in prices since 1862.

During 1887 the average prices in Rome were the following:—

Average prices of some principal articles.

					s. d.	to	s. d.
Wheat..	..	..	..	per cwt.	9	2	8 9½
Indian corn	..	..	..	"	5	9	5 3
Rice ..	..	..	..	"	13	1	12 5½
Table wine	..	..	..	per gallon	1	8	
Olive oil	..	..	..	"	3	5	
Meat ..	..	..	..	per lb.	0	8	

Price of meat
increased till
1887.

The price of the latter commodity has been increasing till 1887, on account of the large exportation of oxen.

1888-89 meat lower 16 per cent.
" wheat higher 11 "

This is on account of the high duty upon cattle applied by France, which checked exportation of oxen, and on account of the duty of 50 lire (2*l.*) per ton which is now levied on wheat imported into Italy. However, this latter duty is not considered sufficiently protective for the national agriculture, and as far as the campagna is concerned no great advance is noticeable in the tilling of land; still, I have no reason to say that land rents are affected by the present state of things.

TIBER EMBANKMENT SEWAGE AND WATER SUPPLY.

Works
proceed
regularly.

The works connected with the Tiber embankment proceed regularly in accordance with the approved plans, and without any serious difficulty being encountered. The compressed air "caissons" are still made use of in laying down the foundations of the embankment. These "caissons" have proved quite a success, and to them Rome is indebted for the imposing works which are destined to regulate the course of the Tiber.

Works allotted
by inter-
national
competition.
Sewers.

The works which have been so far undertaken were allotted by public international competition to five different firms, but more tenders are still to be competed for.

Sanitary
advantages.

The construction of the large sewers which are to collect the foul matters of the city proceed in the same regular manner as the embankment. These sewers are to branch off in various directions, forming thus a general system of sewage flushed by abundant currents of water, and placed at a considerable depth under the level of the streets. Great advantages will thereby derive from a sanitary point of view to the undersoil, and the subterraneous portion of the houses will become drier than at present. The depth at which sewers are laid is not less than 5 metres (6½ yards) below the street level. Their junction with the main collectors will, therefore, be at a much lower depth.

Drinkable
waters.

In a recent municipal report I find some interesting information respecting the quantity of drinkable water which is distributed in Rome in the course of 24 hours. These are the main figures:—

	Cubic Metres.*	
		For use amongst Privates.
Trevi water (or otherwise called Vergine)	80,000	46,655
Felice " (" " Alessandrina)	18,000	19,600
Paola " (" " Trajana)	56,400	28,340
Marcia "	78,000	70,200
	232,400	164,795
Plus aqueduct in course of construction for Marcia water	40,000	..
Total	272,400	..

* 1 cubic metre = 220 imperial gallons.

There are in Rome 356 public fountains (of which 11 are Public ornamental), and the sources of drinkable water collected in fountains. fountains. fountains all over the campagna are as many as 10,000, besides 2,000 cubic metres of Marcia water, which, according to an agreement between the company who have the grant of the said water and the municipality, are divided amongst eight centres of distribution within a radius of 10 kiloms. of the town.

ELECTRIC LIGHT.

This system of illumination which is already adopted in all the theatres and other public buildings, and which is gradually becoming of general use, is up to the present obtained by steam power or gas motors. The Anglo-Roman company for the illumination of Rome with gas and other systems, who have taken up the supply of electric light as well, employ at present two steam engines of 600 horse-power each, and 2 smaller ones of 150 horse-power; but now they have undertaken to utilise the hydraulic power which can be obtained at Tivoli, 20 miles from Rome, and to transmit the electric current from there to Rome in order to illuminate the town on a much larger scale than at present. To put into effect this important undertaking the Company will set up at Tivoli the turbines, the dynamos and all the necessary apparatus, so as to obtain 1,700 horse-power (electric). The current will be transmitted by means of overhead wires as far as a receiving station near Porta Pia. From there the electric light will be distributed in the town by two systems; an overhead system will serve for public illumination and an underground one for private illumination. The copper wires to be used for the overhead system are to be provided by the Società Metallurgica Italiana of Leghorn.

This daring enterprise is to be completed within 18 months hence, and it is considered as the most extensive application of the latest improvement for transmitting electric power to great distances.

Imports in
1888.

RETURN of the Principal Articles of Import to Rome during 1888.

Articles.	From Great Britain.		Total Importation.			
			1888.		1887.	
	Kilos.	Cwt.	Kilos.	Cwt.	Kilos.	Cwt.
Fixed oils	12,203	240	31,831	627	51,155	1,007
Mineral oils	3,900	76	8,252	162	...	...
Coffee	259,216	5,107	322,255	6,542	493,241	9,703
Sugar	15,835	311	16,085	316	73,239	1,442
Biscuits	1,974	39	3,869	74	4,838	94
Cocoa beans	11,547	226	17,214	338	35,214	693
Pepper	22,969	453	25,675	503	50,018	995
Tea	1,897	36	4,080	79	3,796	74
Mustard	1,027	20	2,872	56	2,611	51
Cigars (Manilla, Havana) and cigarettes	1,495	29	51,333	1,020	39,910	785
Oxides of iron, lead, and tin ...	2,702	53	4,902	96	...	...
Oxide of zinc	1,846	36	2,946	57	4,850	95
Chemicals (not named)	1,823	35	13,277	261	18,427	363
Cassia and Tamarinds	1,801	35	1,801	35	...	...
Medicinals, unenumerated	7,527	148	12,943	254	2,768	54
Patent medicines	925	18	4,700	92	3,352	65
Common, scented, and glycerine soap	2,677	52	9,721	191	15,138	298
Perfumeries	1,592	31	10,032	197	15,855	312
Colours	1,291	25	8,162	160	8,588	169
Paints	1,890	37	6,909	135	3,456	68
Ink,	1,177	22	7,496	147	9,719	191
Linen and hemp (woven)	15,290	301	60,547	1,193	...	...
" sewed cotton tissues	1,105	22	8,727	171	10,049	197
" plain woven, unbleached ...	4,304	94	5,363	105	3,593	67
" bleached	32,112	632	50,550	995	107,346	2,113
" in colours or dyed	44,568	877	76,804	1,513	175,154	3,451
" printed	10,892	214	46,184	509	121,673	2,367
" patterned and damasked bleached and unbleached ...	2,940	57	2,231	43	...	...
" coloured or dyed	2,262	44	9,258	183	...	...
" brocaded	2,507	49	3,302	64	...	...
" waxed cloth	1,701	33	3,997	78	185	3
" mixed with less than 50 per cent. wool	3,887	76	4,436	87	...	...
Cotton sewed articles	1,506	29	14,322	281	24,385	480
Plain woven wool manufactures ...	44,923	884	171,686	3,383	180,852	3,573
Woolen carpets	24,472	482	59,859	1,179	62,067	1,222
" sewed articles	2,190	42	12,645	248	32,101	632
Furniture	6,705	131	75,948	1,496	138,979	2,738
Basket work	1,409	27	5,828	114	4,122	81
Paper	6,634	130	51,053	1,005	84,411	1,663
Cardboard	1,185	22	9,951	195	...	...
Books and music	5,073	99	35,154	692	48,494	955
Leather	3,447	67	43,947	865	37,008	729
Gloves	2,122	42	9,617	189	3,933	77
Cast iron manufactures	9,468	186	301,660	5,943	791,814	15,600
Wrought iron, and steel bars ...	33,771	665	140,607	2,770	...	...
" tubes	20,202	397	61,853	1,218	...	...
Iron and steel manufactures	19,898	391	448,262	8,832	379,426	7,476
" plates, leaded and galvanized	1,000	20	1,055	21	...	...
" tinued, coppered	10,929	215	10,945	215	...	...
Steel, tempered, in bars	9,341	183	17,026	335	5,623	108
Instruments and tools of cast ma- leable iron, steel for arts and trades and for agriculture not otherwise specified	1,332	26	15,697	318	54,244	1,168
Copper, brass, and bronze manu- factures	6,041	118	70,891	1,396	11,173	219
Lead and antimony	2,950	57	3,125	61	1,250	24
Zinc plates and sheets	1,050	21	1,130	22	2,100	41
" wares	1,367	27	43,590	858	25,665	505
Optical and surgical instru- ments, &c.	922	18	10,737	211	...	...
Coal and coke	1,969,610	38,800	3,341,079	65,832	4,037,782	79,560
Earthenware	11,582	227	56,486	1,112	142,885	2,816
China	1,977	38	42,163	830	39,287	773
Glass sheets and plates	90,326	1,779	236,642	4,544	179,575	3,538
Glassware	3,501	68	325,718	6,417	316,037	6,226
Dried fruit (rasins)	2,205	43	9,632	189	15,457	303
Preserved fish in boxes	3,039	60	3,772	74	2,629	55
Candles	6,039	118	10,099	198	8,164	162
Wax (yellow)	5,860	115	10,778	212	9,992	198
Hosiery	6,600	129	131,010	2,561	245,883	4,866
Hats	1,152	22	2,439	47	1,483	28

THE AGRO ROMANO.

The draining and general improvement of the "Agro Romano," as far as it lay upon Government, has now reached an advanced state of completion in accordance with the established plans. The main object of the works undertaken by Government is to drain the marshes of Ostia, Isola Sacra, and Maccarese, bordering the coasts at 25 kiloms. (15½ miles) from Rome. They were commenced in 1884. The system adopted consists of defence banks, canals collecting high waters, and which have a direct outlet into the sea, interclusion of the polder to be drained, and canals in the polder itself. The water of the polder is raised by means of machinery, turbine system, and is discharged into the sea. These machines are worked by steam, and are placed in three separate buildings resting on foundations, made of iron "caissons" on the compressed-air system, laid down to a depth of 8 metres 50 centims. (9¼ yards) below the medium sea level. The machinery is of Italian workmanship, having been made by the "Società Veneta di Costruzioni Meccaniche e Fonderia," of Treviso. The draining is to be completed at the beginning of the ensuing year. The chief difficulty in carrying out these works is the unhealthiness of the place which naturally kept back workmen for a good part of the year. During some months it was absolutely necessary to suspend the work. Perhaps it would have been impossible to carry out the undertaking by employing ordinary labourers belonging to this district, and paid by the day. But as in Romagna (district of Ravenna) there exists an extensive association of labourers (a sort of co-operative society) for this particular kind of work; several squads selected, I believe, by drawing, were despatched to the above places every year. The men, who are of a robust constitution, sober, not subject to a master, and have a direct control over their food, wine, and housing, as well as on the hours of work, performed their task peacefully, dividing among themselves the price agreed upon with the contractor.

Sanitary improvements.

Draining of marshes.

Machinery employed.

Italian workmanship.

Unhealthiness of places.

Workmen from Romagna.

Having visited the said places at the beginning of the hot season, I had an opportunity of witnessing the wonderful activity displayed by that hard-working race of men under a scorching sun, and with their feet deep in marshy water. I also had the opportunity of hearing that illness was not frequent amongst them, and that disputes were of a rare occurrence.

Consul visited places.

Their earnings range from 4 lire (3s. 4d.) to 5 lire (4s.) per diem, enabling them to save money, which is the constant thought of the Italian workman.

Earnings of labourers.

The amount spent by Government up to the end of 1888 in the above undertaking was 3,489,500 lire (139,580*l.*). The estimated cost of all the works to be executed by Government was at first fixed at 4,000,000 lire (160,000*l.*) which sum was subsequently raised to 7,500,000 lire (300,000*l.*). It is, however, foreseen that even the latter sum will be found insufficient. It should be observed that in the estimates are included the hydraulic improvements to be introduced in the Valle dell' Almone, near Rome, and the drying

Expenditure.

Land must be paid for. up of some other small marshes. Nearly one third of the above expenditure refers to expropriations. It is a remarkable fact that Government are bound to expropriate and pay for the tracts of marshy grounds which are to be cut into canals, and to border them with fences. An indemnity must besides be paid for the ponds to be dried, without receiving from the landlords any immediate contribution for the improvements introduced by which their property will benefit, save a problematic one which the Government may hereafter claim in proportion to the increase of value acquired by the land when the effects of the drainage shall become manifest.

Landowners hostile to improvements. If that portion of the work which fell within the province of Government has been carried on in a laudable manner, the same cannot be said of the share which the law imposed upon the landlords, who were expected to perform their part of the work all over the campagna. These, with some rare exceptions, showed themselves hostile or indifferent to the proposed improvements. Considering that the matter is one of public interest and of primary importance, in as much as it concerns the salubrity of the land surrounding the capital of the kingdom, the long forbearance shown by the authorities towards the owners of those vast tenements is hardly comprehensible, especially as the law on the subject, although framed in a spirit of absolute respect to property, empowers Government to fully carry out the measures proposed. The improvements, which fall on the landlords, consist chiefly in giving an outlet to the stagnant water as may exist within their lands. The total expenditure for the same does not exceed the sum of 1,837,202 lire (73,488*l.*), of which, up to the end of 1888, only a sixth part had been spent.

Action of authorities lenient. Supply of potable water. The public administration deserves great praise for having secured a large supply of potable water to be used all over the zone traced by the additional scheme for the agricultural improvements within a radius of 10 kiloms. (6 English miles) round Rome. A pipe has also been laid which extends itself as far down as Fiumicino, and which supplies that locality with an abundant quantity of water, as well as the lands along which it winds its course.

PORT OF CIVITAVECCHIA.

Return of shipping. From the ensuing return of all shipping furnished by the Vice-Consul at Civitavecchia, it appears that during 1888 the number of vessels which entered that port was 223 less than the previous year. The number of British vessels was 87 less than the previous year.

British shipping. General decrease. It is to be noted that British shipping furnished during latter years the largest contingent as regards importation. It is not to be wondered at, therefore, if, in the general decrease of shipping noticed by the Vice-Consul they figure for more than one-third. Nor can the difference in their number be made up by the amount of tonnage, as the total tonnage appears to be in the same proportion to the number of vessels as on former years:—

Year.	Vessels.	Tons.
In 1887	210	190,420
1888	123	124,500

This state of matters might lead to the supposition that trade is deviating from Civitavecchia, and is taking another direction; but, according to the Vice-Consul, the chief cause of such falling-off is to be attributed to the importation of corn, which was nearly nil during 1888—first, on account of the higher duty imposed thereon; secondly, because of the larger quantities which had been imported during 1887, in view of the probable increase of duty on that article. Therefore, it may be concluded that the importation of 1888 was very much the same as in the years previous to 1887.

A falling-off is also noticeable on pig-iron for the Terni foundry. This may be explained by the fact that the said foundry had received during 1887 large quantities of that material; so that in the early part of 1888 they used the stock existing. Besides this, some cargoes of iron intended for Terni were, in 1888, for unknown reasons, discharged at Ancona instead of at Civitavecchia. However, the Vice-Consul is informed that for the current year an agreement has been entered upon between the Terni foundry and some carriers at Civitavecchia, for the unloading and carriage to the station of iron and coke to a maximum quantity of 100 tons, and a minimum of 65 tons per day.

RETURN of all Shipping at the Port of Civitavecchia in the Year 1888.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	2	178	121	124,322	123	124,500
Italian ...	926	54,848	558	189,082	1,484	242,580
Belgian ...	...	...	13	11,952	13	11,952
Dutch ...	...	...	3	3,124	3	3,124
French ...	...	...	3	2,858	3	2,858
Greek ...	8	2,436	2	1,366	10	3,802
Norwegian ...	1	157	7	3,941	8	4,098
Spanish ...	22	3,389	7	9,192	29	12,531
Other countries ...	5	1,475	3	2,789	8	4,264
Total ...	964	62,433	717	347,576	1,681	410,009
„ for the preceding year	1,107	86,161	797	420,234	1,904	506,395

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	2	178	136	138,739	138	138,917
Italian	923	55,649	568	188,328	1,491	243,977
Belgian	...	...	13	11,952	13	11,952
Dutch	...	...	3	3,124	3	3,124
French	...	...	3	2,852	3	2,852
Greek	12	3,499	2	1,366	14	4,865
Norwegian	2	509	7	3,941	9	4,450
Spanish	23	3,452	8	10,139	31	13,591
Other countries ...	6	1,855	4	3,396	10	5,251
Total	968	65,142	734	363,837	1,702	428,979
" for the pre- ceding year	1,108	85,877	787	411,753	1,895	497,630

IMPORTS at the Port of Civitavecchia by British Vessels during the Year 1888.

Number of Vessels.	Names of Articles.	Quantities in English Tons.	Remarks.
			Tons. In 1887.
2	Codfish	230	..
4	Grain	5,584	26,768
1	Old rails	1,428	..
1	Spiegel-iron	550	..
10	Pig-iron	15,734	82,718
1	Channel coals	2,013	..
8	Patent fuel	12,821	..
	Steam coal	101,259	83,540
	Gas coals	48,635	..
94	Coke	6,024	..
	General goods	3,485	..
	Fire bricks	1,430	..
121		199,213	298,437

TERNI WORKS.

Total production in 1888.

The production of the steel works in 1888 has been 64,170 tons, representing a value of 668,868*l.*; ditto of the foundry, 13,190 tons, representing a value of 104,523*l.*

Compared with 1887.

The production in 1887 of the steel works and foundry was respectively 39,952 tons, representing a value of 437,709*l.*; 13,308 tons, representing a value of 99,325*l.*

Profits.

The industrial profits for the year 1888 deriving from the steel works amounted to 127,743*l.*, and from the foundry to 14,426*l.* The preceding year had, however, given a loss of 80,000*l.*

Cost of power.

The cost of power in the year 1888 has been 6*s.* 2*d.* per horse-power per working day of 24 hours.

Lignite mines, production of.

The lignite mines belonging to the same company produced 72,321 tons, at a cost of 6½*d.* per ton, which was accounted for at 8*s.* 5*d.*, with the object of establishing a reserve fund, and upon this basis the price of the lignite would have been equal to that of 1*l.* 1*s.* for a ton of coal, taking into account that lignite yields only 40 per cent. of the heating power of coal.

Blast furnaces at Civitavecchia given up.

The project for erecting blast furnaces at Civitavecchia seems to have been abandoned for want of capital.

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1890.
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ITALY.

REPORT FOR THE YEAR 1888
ON THE
TRADE OF VENICE.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 439.

*Presented to both Houses of Parliament by Command of Her Majesty,
FEBRUARY, 1890.*

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ITALY.

VENICE.

Consul-General Sir D. E. Colnaghi to the Marquis of Salisbury.

My Lord,

Florence, December 28, 1889.

I HAVE the honour to transmit to your Lordship, herewith enclosed, a Report by Mr. Vice-Consul de Zuccato on the Trade and Commerce of Venice for the year 1888.

I have, &c.,
(Signed) D. E. COLNAGHI.

Report on the Trade and Commerce of Venice for the Year 1888.

In the year 1888, 317 British steam vessels, with an aggregate tonnage of 394,928 tons, arrived at Venice, and 324, with a tonnage of 400,814 tons, departed from this port, there being a decrease as compared with the former year of 28 steamers, with 22,808 tons in the entries, and 27 steamers, with 27,211 tons, in the clearances.

This falling off in the number and tonnage of vessels under the British flag is to be chiefly ascribed to the cessation of the direct line of steam navigation to and from Venice and Indian ports.

The following returns of the number and tonnage of ships of all flags which entered and cleared in 1888 show an increase of eight ships, with a decrease of 46,895 tons in the entries against the year 1887:—

RETURN of all Shipping at the Port of Venice in the Year 1888.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	317	394,928	317	394,928
Italian	1,360	87,284	345	221,511	1,705	308,795
Austro-Hungarian	563	24,888	250	128,957	913	163,845
German	...	...	33	18,363	33	18,363
Swedo-Norwegian...	1	597	13	7,186	14	7,783
Greek	13	4,224	2	1,304	15	5,528
Russian	...	...	3	3,864	3	3,864
Dutch	...	...	3	2,731	3	2,731
Danish	...	...	1	615	1	615
Turkish	11	458	...	...	11	458
Montenegria ...	4	146	...	...	4	146
Total	1,952	127,597	1,067	779,459	3,019	907,056
" for the year preceding	1,893	136,321	1,113	817,630	3,011	953,951

RETURN of all Shipping at the Port of Venice in the Year 1888.

CLEARED.

Nationality.	Sailing.		Steamers.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	324	400,814	324	400,814
Italian	1,354	86,911	244	221,506	1,698	308,417
Austro-Hungarian	556	35,665	356	135,027	912	170,692
German	...	...	32	18,298	32	18,298
Swedo-Norwegian...	1	597	13	7,186	14	7,783
Greek	19	6,764	2	1,304	21	8,068
Russian	...	...	3	3,864	3	3,864
Dutch	...	...	3	2,731	3	2,731
Danish	...	...	1	615	1	615
Turkish	13	533	...	...	13	533
Montenegria ...	3	107	...	...	3	107
Total	1,946	130,577	1,078	791,345	3,024	921,922
" for the year preceding	1,912	137,514	1,118	823,907	3,030	961,421

Peninsular
and Oriental
Steam Navigation
Company.

The Italian Government concluded in the month of June, 1888, the following new convention with this company for a regular service of steam navigation from Venice to Alexandria in Egypt. The steamers of the company which formerly proceeded every week to Alexandria, touching at Ancona and Brindisi, and once a month to India, conveying passengers and cargo without transshipment, now leave Venice every alternate Friday for Alexandria, calling at Ancona and Brindisi. Passengers and goods shipped at Venice for Indian or Australian ports are landed at Brindisi for transshipment on board the company's steamers proceeding to and from the above ports.

The long and difficult negotiations for the conclusion of the following convention, in consequence of a strong disposition on the part of the Italian Parliament to entrust this service to a

national company, were ably and energetically carried on by Mr. Alexander Malcolm, who is the legal representative of the company in Italy, and who succeeded in convincing the Government of the advantages offered by the Peninsular company to Venice in the way of punctuality, safety, speed, and economy.

It is but fair to say, however, that the local commercial authorities expressed great satisfaction at the conclusion of the convention.

Article 1. The convention stipulated by the Government with Mr. Alexander Malcolm for a fortnightly service of steam navigation between Venice and Alexandria in Egypt touching at Ancona and Brindisi is hereby approved.

Article 2. Article 37 of the said convention is modified as follows: "The present convention shall come into operation on February 1, 1888, and shall last 18 months, that is to say, to the end of July, 1889. If the convention is not denounced six months previous to its expiration, it shall be continued for another year, namely, to the end of July, 1890, when, if not denounced, it shall be prorogued to the end of December, 1891.

Article 3. Three months before the expiration of the convention, as stated in the Article transcribed above, the Government is to demand the authority of Parliament to avail itself of the powers conferred by the said article.

Article 4. For the fulfilment of the conditions agreed to by the said convention, the Government is authorized to enter on the debit side of the budget of the Ministry for Public Works a further sum of 114,083 lire for the service now going on, and a sum of 275,000 lire for the years 1888-89.

By the following tables, showing the quantity and value of Trade and the imports and exports at the port of Venice, compiled from the commerce. official statistics of the Chamber of Commerce, it will be seen that in 1888 there was an increase in the value of the total trade of 6,464,886 Italian lire.

The importation and exportation was inferior to that of 1887, Brandy and both on account of the heavy new tax imposed by the Italian spirits. Government, and the low price of wine in 1888, owing to the failure of the commercial treaty with France.

There was a falling off in the imports and exports. The Oats. increase of import duty caused a rise in the prices, and a limited demand for consumption.

There was an average crop in 1888, and prices, which were Wheat. 19 lire per 100 kilos. in the month of June, rose later to 24 lire. The importation was of no importance in consequence of the general abundant crop in 1887, and the higher duty imposed on foreign wheat imported into the kingdom.

There was not a large importation of this produce owing to Maize. the increase of duty imposed on foreign wheat, and the plentiful crop of the previous year. Prices rose from 14 lire to 17 lire.

The rice crop was scarce, and the price of native rice rose Rice. from 19 lire to 23 lire per 100 kilos. There was a falling off in the imports and exports during the year. The Government having

acceded to a request of the rice merchants to be allowed to import this produce free of duty on condition of its being re-exported, the rice millers in these provinces have continued to import rough rice from Burmah and Japan to have it milled and cleaned for exportation. The rice millers were thus enabled to keep their establishments open, to the benefit of the numerous hands employed.

Coffee.

The heavy fluctuations in the prices of this produce, caused principally by the gambling operations effected at Hamburg and Havre, discouraged importers from speculating on a large scale and therefore, the imports and exports fell in 1888.

Coal.

There was an increase in the imports during the year owing to the development on a large scale of the system of reclaiming vast tracts of lands by steam drainage for cultivation, and a higher demand in 1888 from railway companies.

The qualities of coal imported from England are as follows:—

Steam coal, Newcastle, Cardiff, Newport, and Glasgow.

Gas coal, New Pelton, South Pelton, Pelton Main, Hebburn, and Cannel, the last of which is only used to enhance the illuminating power of ordinary gas. Cargoes of coke and small coal are imported from Cardiff, Newport, and Newcastle, and also quantities of patent fuel from the Bristol Channel.

Prices have risen during the year in consequence of the English workmen having enforced by strikes an extra 10 per cent. on wages.

Manufactured goods.

The imports and exports show a decline in 1888. The principal causes are the failure of the commercial treaty with France, and the enforcement of the general higher tariff against other States on March 1, 1888. Several qualities of wool and cotton goods and yarns formerly imported in large quantities from England, are, for the reason above stated, totally excluded from these provinces.

Cotton.

Large operations were made during the year, and there was an increase in the import on account of the development of the textile industries and the opening of cotton-spinning mills in these provinces.

Olive oil.

The crop was scarce in 1888, and the speculation was limited to the demand for consumption in Venetia.

Raw hides.

There was a decline in the imports, caused chiefly by there being now no direct communication between Venice and India.

Cotton oil.

Owing to the heavy import duty enforced by the Government, with the object of preventing this oil being mixed with native olive oil, and thus raising the credit of the latter, only a small quantity of cotton-oil was imported. It is stated, however, that the mixture is made in the Austrian ports, and that the merchants there then send their mixed oil into these provinces, thus causing injury to the local trade.

Beads.

This industry was affected by the failure of the commercial treaty with France, and the decrease of exports was rather considerable in 1888.

Hemp.

There was an average crop in 1888. Shipments of hemp are

yearly sent from this port to the dockyards of Devonport and Chatham for the use of Her Majesty's Navy.

No machines would appear to be in use in the hemp-growing districts in these provinces for breaking the hemp-stalks after being retted, and for cleaning the fibre. The whole operation is still performed by hand labour only.

Notwithstanding the appearance of the phylloxera and peronospora in some districts in these provinces, the vintage was abundant in 1888, and the wine produced of excellent quality. Vintage and wines.

As stated in previous reports, Venetian wine growers continue actively to improve the qualities of their wines by paying all possible attention to the conditions which wines in bottle require for exportation to foreign markets, and they are now successfully competing with the wines of other countries.

Among the principal producers who have shown great spirit of enterprise and invested large sums of money to form vineyards to develop the wine-growing industry are the Counts Papadopoli, who export their wines chiefly to England and North Germany. Their cellars are amply provided with delicate red and white wines, and the brands "Borgogna," "San Giorgio," and "Castel San Polo" are said to be in great demand. The wine is sold in bottles, and is stated to be capable of supporting long sea voyages. The Counts Papadopoli's trade in wines is carried on in a liberal manner and on a large scale, and it yields them a considerable yearly revenue.

RETURN of Principal Articles of Import to Venice during the
Years 1888-87.

Articles.	1888.		1887.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Wines and spirits ..	45,250	656,022	36,141	688,897
Animals for slaughter ..	5,615	210,142	6,607	266,111
Stearine candles ..	152	8,168	158	9,442
Paper, books, and prints ..	3,105	98,924	3,584	102,244
Wax	188	19,959	315	44,114
Grains	148,266	1,300,837	151,962	1,185,404
Glass, beads and enamels ..	1,075	107,724	1,003	126,040
Resin	1,193	6,684	869	4,174
Colonial produce and drugs	7,019	262,045	7,066	359,455
Colours and dyewoods ..	1,082	33,917	1,176	21,300
Indigo	47	34,128	45	27,120
Fuel, coal, &c.	442,708	541,054	378,000	462,840
Hardware, earthenware, and jewellery ..	1,329	39,942	1,722	65,552
Cheese	1,889	175,703	2,186	194,208
Fruits	22,074	290,358	22,910	310,823
Glucose	6	102	133	2,132
Gums	203	16,256	220	17,648
Timber, rough and worked	88,325	249,141	66,374	192,303
Yarns and manufactures, silk, woollen, and cotton	5,193	921,723	5,526	1,055,229
Hemp	11,942	382,173	9,166	293,324
Cotton	17,290	829,963	14,705	558,809
Wool	1,321	158,616	1,106	88,528
Other materials for weaving	806	122,595	453	9,107
Medicines and medicinal preparation ..	2,869	15,439	2,660	152,576
Metals, rough and worked	3,702	507,170	46,039	598,198
Natron	120	672	961	5,384
Nitre	524	11,334	370	8,011
Oils	17,729	559,439	18,955	694,599
Petroleum	17,176	144,058	11,465	81,750
Hides and leather ..	2,685	265,073	2,553	232,006
Fish, dried and prepared	7,988	246,383	5,046	148,152
Stone, lime, and cement ..	94,871	125,402	79,196	95,993
Salt	26,596	31,915	22,739	27,287
Soap	886	19,469	1,067	25,758
Raw silk, cocoons, and waste	231	107,383	287	243,072
Oil seed	8,796	98,681	12,695	145,009
Butter	2,384	107,517	2,037	107,551
Tobacco	2,261	66,631	3,043	87,564
Gall nuts and bark ..	2,581	41,811	2,524	50,273
Sulphur	15,735	54,283	13,961	37,564
Matches and inflammable materials ..	25	2,535	152	13,484
Sundries	23,414	297,276	20,990	251,422
Total	1,067,651	9,175,159	958,122	9,089,952

RETURN of Principal Articles of Export from Venice, during the
Years 1888-87.

Articles.	1888.		1887.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Wine and spirits	25,549	383,831	16,174	335,353
Animals for slaughter	124	9,979	114	10,377
Stearine candles	90	4,840	88	5,286
Paper, books, and prints ..	1,474	52,403	1,632	53,188
Wax	578	90,740	695	124,294
Grains	129,740	1,159,867	132,656	1,055,175
Glass, beads and enamels ..	371	70,158	315	65,868
Resin	402	2,152	587	2,820
Colonial produce and drugs ..	5,871	255,476	6,326	353,792
Colours and dyewoods	830	24,325	877	15,666
Indigo	11	7,992	12	7,260
Fuel, coal, etc.	321,944	864,102	220,772	240,710
Hardware, earthenware, and jewellery	6,172	407,917	7,066	383,082
Cheese	1,300	130,030	1,468	139,839
Fruits	14,179	231,293	13,647	213,708
Glucose	825	12,884	900	14,410
Gums	141	11,288	151	12,151
Timber, rough and worked ..	51,434	226,552	36,645	165,237
Yarns and manufactures, silk, woollen and cotton	5,522	751,149	5,798	802,911
Hemp	8,657	277,036	8,890	284,485
Cotton	13,364	641,476	14,164	538,225
Wool	1,117	134,034	957	76,622
Other materials for weaving ..	353	6,317	247	4,958
Medicines and medicinal preparation	2,080	122,132	2,184	121,588
Metals, rough and worked ..	33,227	377,574	27,681	355,534
Natron	47	266	89	502
Nitre	7	151	4	86
Oils	15,047	479,872	15,324	559,756
Petroleum	18,030	148,796	8,636	65,117
Hides and leather	2,570	244,280	2,855	252,052
Fish, dried and prepared	5,380	169,848	3,886	114,847
Stone, lime, and cement	29,992	38,264	26,739	44,014
Salt	20,335	24,402	19,766	23,959
Soap	768	16,909	972	33,065
Raw silk, cocoons, and waste ..	242	112,256	305	250,088
Oilseed	8,450	96,012	11,961	134,265
Butter	1,936	70,005	1,466	68,448
Tobacco	2,645	82,982	2,961	91,722
Gall nuts and bark	2,375	38,006	2,347	34,749
Sulphur	13,454	64,582	13,632	68,163
Matches and inflammable materials	1,223	50,200	1,251	61,414
Sundries	11,887	262,423	13,611	289,293
Total	759,743	7,654,708	625,861	7,474,039

TABLE showing the Total Value of all Articles Imported to Venice from Foreign Countries during the Years 1888-87.

Countries.	1888.	1887.
	£	£
By land and river navigation ..	3,999,709	3,809,027
Great Britain.. ..	839,650	950,093
Italy	1,334,108	1,281,587
East India	1,069,524	869,406
Austria-Hungary	672,132	807,254
Russia.. ..	613,466	448,857
Turkey	111,578	151,069
China	..	103,985
France	91,770	80,229
Belgium	84,690	76,784
Japan	78,092	73,272
Roumania	69,319	94,175
Sweden and Norway	65,996	21,250
United States of America	46,634	75,344
Ionian Islands	31,740	77,286
Egypt	26,166	71,543
Brazil	10,907	9,158
Holland	10,516	30,690
Germany	9,169	42,565
Greece.. ..	5,068	2,444
Arabia.. ..	4,580	1,376
Denmark	653	..
Malta	592	1,302
Spain	100	..
Barbary	..	10,649
Australia	..	127
Total	9,175,159	9,089,952

TABLE showing the Total Value of all Articles Exported from Venice to Foreign Countries during the Years 1888-87.

Countries.	1888.	1887.
	£	£
By land and river navigation ..	5,447,258	5,300,020
Great Britain.. .. .	324,894	312,485
Italy	843,378	902,760
Austria-Hungary	432,500	460,729
East India	174,629	102,570
Turkey	108,946	95,646
Greece.. .. .	83,392	83,866
Egypt	59,499	68,012
Ionian Islands	46,018	48,605
United States of America	44,909	9,190
Australia	17,233	14,123
Spain	14,537	1,361
France.. .. .	11,353	9,400
Russia.. .. .	9,269	9,780
Malta	8,490	12,544
Germany	6,949	10,268
Roumania	6,850	11,306
Japan	5,162	7,819
Brazil	5,096	123
Arabia.. .. .	2,187	8,268
China	2,148	4,168
Belgium	6	95
Barbary	..	9,570
Tunis	..	880
Denmark	..	290
Holland	..	166
Total	7,654,708	7,474,039

Population.	The population of Venice consisted, on December 31, 1888, of 153,575 souls.
Births.	The births numbered 4,237 (males, 2,195, females 2,042). The legitimate births were 3,605, illegitimate 373, foundlings 226.
Marriages.	The legal marriages registered in 1888 were as follows:—

Between bachelors and spinsters	..	..	..	947
bachelors and widows	..	..	..	31
" widowers and spinsters	..	..	..	90
" widowers and widows	..	..	..	31
				1,099

Deaths. The deaths were 3,394, corresponding to the death rate of 22·7 per 1,000 inhabitants, and to the average mortality of nine persons a day. The deaths included 1,757 males, and 1,637 females. The above death rate of 22·7 was inferior to that of all the other principal towns in Italy, with the exception only of Leghorn, the death rate of which was 21·7 during the year under review.

Hospitals and lunatic asylums. There were under treatment on December 31, 1888, 2,682 persons. The total number of sick patients admitted to the hospitals and asylums in 1888 was 13,556, of whom 12,862 recovered, and 1,081 died.

Prisons. On the last day of the year 1888 there were in confinement at Venice 968 persons. The entrances during the year were 3,036, and the exits 3,013, and 28 deaths.

There are two convict and three criminal prisons in Venice. The former are for male and female inmates sentenced to long terms of imprisonment with labour, and the latter for prisoners undergoing short sentences or awaiting their trial. Convicts in the penal establishments are compelled to work according to their capacity, and they receive a proportion of their earnings. They are all clad in a special prison suit provided by the prison authorities.

Prisoners detained for short sentences are not obliged to work, and are allowed to wear their own clothes, to read and write, and to receive the visits of their friends, under regulations subject to the approval of the judicial authorities. In all the above prisons the prisoners are in association day and night. The prisons for short sentences are generally damp, badly ventilated, full of insects, and totally unfit for human beings. Owing to the system adopted by the Government of paying a contractor a fixed price per head per diem for subsisting the prisoners, they now and then complain loudly of receiving unwholesome provisions. It is but just to add, however, that there are Government Inspectors occasionally examining the food, and administering justice in an impartial way.

Public health. The sanitary condition of Venice was not perfect during the year. Small pox spread all over the town. I regret to say that Venice has made no progress with regard to setting its drains in order, and, indeed, of about 19,000 houses only 6,000 have drains and sinks; all the others, that is to say about 13,000, discharge

the excreta directly and indirectly through pipes, either into the canals of the city or into the large conduits passing under the streets and flowing into the canals.

It would appear essential for the welfare of the town that due regulations should be enforced by the local authorities for compelling all houseowners to execute the necessary structural works to prevent the drains flowing into the conduits or into the canals, so that the excreta might be promptly and thoroughly removed to be applied to the fertilization of the adjoining country. In 1887 an English company opened negotiations, through the medium of a local lawyer, to obtain a free concession of a piece of neighbouring land for the preparation of manure, and to be allowed to apply their system of carbon sewage in a compulsory way, but, owing to several difficulties to be surmounted, the project was not carried out. Since that time two private establishments have been erected on the marshes, near Mestre, for the manufacture of chemical manure, but there has been no improvement in the drainage of the city.

By constructing, if practicable, the above-mentioned sanitary works without further delay, Venice would not only save a vast amount of money expended in expurgating the conduits under the streets, and in the eventual excavation of canals, but derive profit from the judicious application of resources so long neglected, and become also, on this account, a city unrivalled in the world.

The construction of the north breakwater for reopening the port of Lido, as stated in previous reports, was carried on with the utmost energy during the year, and nearly brought to its completion. The works for the construction of the south breakwater, which starts from "San Nicolò di Lido," and will stretch out to sea about 1,350 metres beyond the bar, have been already commenced, and are to be completed about the end of the year 1893. Public works.

In the opinion of technical experts this most important enterprise will prove entirely successful, as the channel inclosed between the breakwaters will be so deepened by the ebb and flow, that ships of any size will be able to have direct and easy exit from and entrance into the harbour.

By means of incessant dredging operations in the bed of the channel, which is of soft mud, its depth has now been brought to 9·50 metres at ordinary high tide. Malamocco channel.

As formerly stated, there is no dock accommodation for merchant vessels either at Venice, or at any other Italian ports of the Adriatic. Consequently, when the docks in the arsenal are used by ships of war, merchant vessels are compelled to proceed to Trieste for the necessary repairs, to the discredit and loss of this port. The Government having consequently approved the construction of a dock for private accommodation, a proposal has been made for the erection of a floating dock to raise vessels out of the water for repairs, inasmuch as no place could be more favourable than Venice from the little rise and fall of the tide, and the general smooth surface of the waters of the Lagoons. Dock accommodation.

The Government would appear, however, to have the intention of constructing a dry dock, and a sum of 3,260,000 lire has already been assigned by the Ministry for Public Works for this purpose.

Maritime
station.

The demand for accommodation for discharging ships in the maritime station has so much increased since its opening that in addition to the new quay, which is in course of construction, the Adriatic Railway Company has presented to Government a project for lengthening the principal quays, for the construction of new stores, for widening the bridge on the Grand Canal, for fixing hydraulic cranes, and for the application of the electric light, for a sum of 4,000,000 lire.

During the years 1883, 1884, 1885, the total number of ships which entered the maritime station was 1,608, there being an average of 356 ships a year; during the years 1886, 1887, 1888, 2,119 ships entered, and therefore, the average was 706 a year.

The increase in the number of ships shows also a considerable progress in the quantity of merchandize shipped and landed therein, as may be seen by the following table:—

TABLE showing the Quantity of Merchandise Shipped and Landed at the Maritime Station at Venice during the Years 1882, 1883, 1884, 1885, 1886, 1887, 1888.

Year.	Quantity.		Total.
	Goods Landed.	Goods Shipped.	
	Tons.	Tons.	Tonnage.
1882.. ..	84,266	8,445	98,108
1883.. ..	145,804	13,778	159,562
1884.. ..	175,058	26,264	201,322
1885.. ..	249,789	20,512	270,301
1886.. ..	251,362	13,995	265,357
1887.. ..	251,807	15,865	267,672
1888.. ..	372,033	22,006	394,041

Arsenal.

The works in the arsenal were carried on with great energy during the year. In addition to the construction of large ships of war of the first class, and torpedo boats, the larger dry dock was nearly brought to the length of 140 metres, so as to enable ships of any size to be admitted therein. Four covered slips have been constructed for placing small craft on the stocks.

About 6,000 persons are daily employed in the arsenal.

The project for illuminating by electricity the whole arsenal, in accordance with the system adopted at Spezia, has already been sanctioned by the Government.

Public works
at Chioggia.

The project for the public works to be executed at Chioggia, as reported last year, has been revised, and the wet dock to be constructed will be 200 metres long, 90 metres wide and 6.50

metres deep. The railway embankment is to be widened, and the leading canal of navigation to and from Chioggia and the basin to be excavated. The Government has sanctioned the expenditure of 700,000 lire for the execution of such works.

Under the auspices of the British residents, a new church was opened in a central position on the Grand Canal, in front of the principal hotels. It is maintained by subscriptions and donations. The Rev. K. Jameson, the chaplain, is rendering meritorious and gratuitous services to the English residents, and numerous tourists, who occasionally apply to him.

A sailors' institute has been opened in this town, to enable seamen to spend their leisure time in a manner conducive to their moral and social improvement, under the management of Mr. John Whitehead, of the Seamen's Mission. I am happy to say that the institute is much frequented by the English sailors, and that Mr. Whitehead is carrying on his work with the utmost zeal. This institute is also maintained by subscriptions and donations.

Cases frequently occur of British people having to enforce a sentence in Italy, against foreign subjects, obtained from a legally constituted court in England, commencing proceedings anew in this Kingdom, in accordance with the local laws, thereby incurring a heavy expenditure, with a doubtful probability of success. Whenever a sentence against foreigners is legally pronounced by a duly constituted court in England, the enforcement of the same in Italy may be demanded by the Court of Appeal in the jurisdiction of which the sentence is to be put into execution, on production of the original documents duly legalised by an Italian consul. The Court of Appeal will examine if the sentence has been legally issued, and if all the required formalities with respect to the serving of summonses, &c., have been observed; and, if there is nothing in the said sentence against public order or public right, the court will issue a decree giving the same force to the judgment as if it had been delivered by an Italian tribunal. This mode of proceeding, which would appear to be little understood in England, or at any way imperfectly used, is called "Giudizio di Delibazione." The Court of Appeal at Venice has jurisdiction over all the Venetian provinces.

It is with the greatest satisfaction that I am able to state that since 1887 I have received no verbal or written complaint from British subjects on the subject of purchases made by them in this town. Owing to the praiseworthy and courageous efforts of the Commendatore, Paulo Fambri, who is the director of a local newspaper, a committee for commercial honesty, under his presidency, has been formed in this town. In the event of any complaint being brought under the notice of the committee against those few shopkeepers who were formerly in the habit of acting in an unfair way, or against any others, an inquiry is instituted into the circumstances of the case, and, if the complaint is just, immediate redress is demanded from the party concerned, and in case of refusal, which is not at all likely, his name and the whole facts of the case are to be made public by means of the press. Considering

that the authorities had no legal means to act in the matter, no better remedy could have been devised for putting a stop to an evil so loudly complained of.

House pro-
perty.

The constant progress in the trade and commerce of Venice during late years is by no means the only indication of improvement shown by this city, inasmuch as the population has increased, and is increasing every year, the value of house property has greatly augmented, and rents have risen, as a natural consequence. It can confidently be asserted, as may be seen by the yearly reports from this office, that in the comparatively short time since Venice became united to the Kingdom of Italy, she has completely recovered from her previous state of depression, and the Venetians are looking forward to a time when their city shall also be able to regain the commercial dominion of the Adriatic.

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AND FINANCE.

ITALY.

REPORT FOR THE YEAR 1889
ON THE
FOREIGN TRADE OF ITALY.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 497.

*Presented to both Houses of Parliament by Command of Her Majesty,
MARCH, 1890.*

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ITALY.

ROME.

The Marquis of Dufferin and Ava to the Marquis of Salisbury.

My Lord,

Rome, February 19, 1890.

I HAVE the honour to forward herewith a Report which has been drawn up by Mr. Dering, Secretary of Her Majesty's Embassy, on the Foreign Trade of the Kingdom of Italy for the year 1889.

I have, &c.

(Signed) DUFFERIN AND AVA.

Report on the Foreign Trade of Italy for the Year 1889.

According to the returns just issued by the Director-General of Italian Customs, the trade of Italy during 1889 contrasts very favourably with that of the preceding year.

The value of merchandise imported into Italy in 1889 as compared with 1888 is stated to be as follows:—

			Currency.	Sterling.
			Fr.	£
1889	..	..	1,890,679,788	55,627,191
1888	..	..	1,174,601,582	46,984,063

General value
of exports^a
and imports
as compared
with previous
years.

Showing an increase in favour of 1889 of 216,078,206 fr. (8,643,128*l.*).

The value of goods exported from Italy to foreign countries during the same periods is given as under:—

			Currency.	Sterling.
			Fr.	£
1889	..	..	950,475,905	38,019,036
1888	..	..	891,984,539	35,677,381

Being an excess in favour of the past year of 58,541,366 fr. (2,341,655*l.*).

The imports exceeded the exports by:—

			Currency.	Sterling.
			Fr.	£
1889	..	..	440,203,885	17,608,157
1888	..	..	282,667,043	11,306,681

Showing also an increase in 1889 of 157,536,840 fr. (6,301,476*l.*).

These figures are exclusive of the import and export of precious metals, the former of which showed a decrease of 17,417,000 fr. (696,680*l.*), and the latter of 20,420,600 fr. (816,824*l.*) over the figures relating to the preceding year.

Explanation
of apparent
increase.

This increase in favour of 1889, however, can hardly with fairness be attributed entirely to the recovery of trade from the marked stagnation visible in 1888, but may be said to have arisen in part from the rise in the average prices of merchandise. The depreciation in the price of grain and of some other articles of food have partially neutralised the effects of the general rise in prices, whilst the increased cost of raw silk and of wine has contributed in no small measure to the higher valuation placed on Italian merchandise sent abroad.

The increase visible both in exports and imports during the past year, as compared with 1888, is attributable, therefore, not only to increase in quantity, but to the increased value of both imports and exports, amounting in the former case to 27,008,642 fr. (1,080,346*l.*), and in the latter to 40,179,588 fr. (1,607,183*l.*). Deducting these figures from the apparant increase, we arrive at the following as the real increase in the movement of trade in 1889 as compared with 1888:—

			Currency.	Sterling.
			Fr.	£
Imports	..	..	+ 189,069,564	7,562,782
Exports	..	..	+ 18,361,778	734,471

Imports and
exports by
groups.

Grouping the returns in the form mostly in use in European countries we arrive at the following result:—

IMPORTS.

	1889.		1888.	
	Currency.	Sterling.	Currency.	Sterling.
	Fr.	£	Fr.	£
Articles of food ..	365,853,765	14,634,151	286,332,610	11,453,304
Raw material ..	448,844,115	17,953,764	363,892,981	14,555,719
Prepared material ..	217,499,606	8,699,983	185,633,029	7,425,322
Manufactured goods	358,482,606	14,339,304	238,742,962	9,549,718
Total ..	1,390,679,788	55,627,202	1,074,601,582	42,984,063

EXPORTS.

	1889.		1888.	
	Currency.	Sterling.	Currency.	Sterling.
	Fr.	£	Fr.	£
Articles of food ..	271,049,864	10,841,994	270,560,138	10,822,405
Raw material ..	174,224,111	6,968,964	169,865,258	6,794,610
Prepared material ..	385,700,896	14,228,035	316,266,507	12,050,660
Manufactured goods	149,501,034	5,980,043	135,242,636	5,409,705
Total ..	950,475,905	38,019,036	891,934,539	35,677,381

As will be seen from the foregoing figures, articles of food represent about one-quarter of the whole trade of the country, raw and partially prepared materials about one-half, and manufactured goods about the remaining quarter.

Articles of food contributed the amount of 79,500,000 fr. Imports. (3,180,000*l.*) to the above-mentioned increase in 1889 of Cereals. 216,000,000, and would have contributed a still larger proportion had not the average price of grain fallen 10 per cent.; for this one item of cereal represents, so far as value is concerned, nearly the half of the receipts under the heading of alimentary substances. However satisfactory these returns may prove to the exchequer, they cannot be said to be so to the already depressed agriculturists within the country. The figures for the last two years are as under:—

	Quantity Imported in Tons.	Duty Received.	
		Currency.	Sterling.
		Francs.	£
1889	872,743	43,637,150	1,735,485
1888	669,789	33,489,450	1,339,568
Difference ..	202,954	10,147,700	405,908

There has further, during the past year, been a very large increase in the import of minor cereals, especially of Indian corn, of which latter product 158,356 tons entered Italy in 1889, as against 2,168 tons in the previous twelvemonth. Rice was also imported to the increased amount of 10,000 tons, not without considerable benefit to the Treasury.

The above figures are specially interesting, as cereals and analogous products represent 56 out of the 79,500,000 increase in the returns for articles of food.

Colonial
produce.

The increased import in colonial produce is most marked in the item of sugar, of which 781,801 quintals were imported in 1889, as against 415,691 quintals in 1888. This item alone shows an increase in value of nearly 13,000,000 fr. (520,000*l.*). Pepper and pimento also showed a considerable increase, with an import of 15,561 quintals in 1889, as against 8,980 quintals in the preceding year.

Spirits.

The increased import of pure alcohol, amounting to 36,331 hectolitres in 1889, as compared with 6,566 hectolitres in the preceding year, with relative values of 1,380,578 fr. (55,223*l.*) and 288,904 fr. (11,556*l.*), may perhaps be considered as temporary, for since the new regulations have been in force granting greater facilities to native producers, the import returns have been steadily decreasing month by month.

1889.	October	..	..	..	10,404 hectolitres
"	November..	..	..	..	8,479 "
"	December..	..	..	..	7,697 "
1890.	January	..	..	..	5,950 "

Olive oil.

With regard to olive oil, the increase of 26,650 quintals in the quantity imported is about balanced by an increase in the quantity exported of 28,728 quintals. Olive oil is principally imported into Italy from Austria-Hungary, Greece, and Malta, and in small quantities from Tunis, Tripoli, and Spain. France, Great Britain, and South America are the principal markets for its export.

Raw and
prepared
material.

To turn to the groups representing raw material and semi-prepared material, it will be seen they together represent an increase of 117,000,000 fr. (4,680,000*l.*) out of the total of 216,000,000 fr. above referred to. This increase, again, is partly due to increase of business, but chiefly to the rise in prices. The following table of average prices during the last two years may serve as a guide to the appreciation between the actual and the apparent situation :—

Articles.			1888.	1889.	Varying prices of raw material.
			Francs.	Francs.	
Raw jute	.. ..	Per quintal	37	40	
" cotton	.. ..	"	115	125	
" wool	.. ..	"	255	300	
			(medium)		
Cocoons	.. ..	"	950	1,050	
Raw silk	.. ..	"	4,000	4,500	
Silk waste	.. ..	"	275	300	
Scrap iron	.. ..	"	7	8	
Pig iron	.. ..	"	7	8½	
Coal	.. ..	Per ton	23	27	

The imports of all these articles showed an increase in quantity in the past year, as will be seen from the following figures:—

Articles.	1889.	1888.	Difference.
	Quintals.	Quintals.	Quintals.
Raw jute	50,970	46,079	4,891
Cotton	898,429	749,784	148,645
Wool	97,589	93,788	3,801
Cocoons	23,060	10,429	12,631
Raw silk	11,130	6,972	4,158
Silk waste	4,284	2,208	2,075
Scrap and pig iron	3,259,051	2,541,403	717,648
Coal	8,999,117	3,872,905	126,212

These augmentations, however, are insufficient to account (prices being equal in both years) for the large increase noted in the statistical returns for 1889 over those for 1888.

Taking the four larger items above quoted, the subjoined figures will show how the increase in them is to be accounted for:—

INCREASE.

Articles.	Attributable to Increased Importation.		Attributable to Increase in Value.	
	Currency.	Sterling.	Currency.	Sterling.
	Fr.	£	Fr.	£
Raw cotton	17,094,175	683,667	— 8,984,290	359,371
Cocoons	11,999,450	479,978	— 2,306,000	92,240
Raw silk	16,632,000	665,280	— 5,565,000	222,600
Coal	2,902,876	116,115	— 15,996,468	639,658

There is an increase from these four articles alone of 81,480,259 fr. (3,259,200L.), of which 48,628,501 fr. are due to increased consumption, and 32,851,758 fr. (1,314,070L.) to the difference in the value of the goods.

Wood and
pastes for
straw paper
manufacture.

The import of pastes of wood and straw for the manufacture of paper exceeded 111,500 quintals, being an increase of nearly 30,000 quintals over the amount imported in 1888. This industry has, within the last few years, shown a considerable development, as in 1888 scarcely 6,000 quintals were imported. Taken together with the large decrease in the export of rags, which in 1880 amounted to over 107,000 quintals, and in 1889 to only about 15,000, one may fairly assume that this branch of national industry is in a satisfactory condition. It seems difficult to understand why this 100,000 quintals of pastes of wood and straw cannot be produced entirely in Italy, as a few of the millowners find it easy and profitable to do so.

Hides.
Oleaginous
seeds.

The imports of raw hides shows also a considerable increase in 1889, giving a value of 3,000,000 fr. (120,000*l.*) in excess of those imported in 1888, and oleaginous seeds of all sorts, especially flax seeds (the imported value of which in 1889 exceeded that in 1888 by some 140,000 fr.), show that the additional duty of 1 fr. 10 c. per quintal placed on them has in no way affected the amount imported.

Manufactured
goods.

With regard to the remaining group of manufactured articles, which represent about one-quarter of the international commerce of the country, the figures for 1889 and 1888 are as follows:—

			Currency.	Sterling.
			Fr.	£
1889..	..	..	358,482,606	14,339,804
1888..	..	..	338,742,962	13,549,718

Showing an increase for the past year of 19,739,644 fr. (789,585*l.*), and contributing therefore scarcely one-tenth towards the total increase on the year.

The principal items in this group showing an increase are shown as under:—

			1889.	1888.	Difference.
Colours and varnishes ..	..	Quintals ..	36,472	33,214	+ 3,258
Cotton tissues ..	..	..	102,673	80,749	+ 21,924
Woollen tissues..	..	..	41,892	37,303	+ 4,589
Paper ..	..	..	60,045	55,617	+ 4,428
Tanned hides ..	..	..	20,360	18,345	+ 2,015
Machinery ..	..	..	371,076	362,283	+ 8,793
Railway carriages and trucks..	..	..	178,510	88,769	+ 89,741
Starch ..	..	..	17,861	13,002	+ 4,859
Artificial flowers ..	..	Kilos. ..	8,298	6,750	+ 1,548

A decrease is shown under the following heads:—

				1889.	1888.	Difference.
Silk tissues	..	..	Kilos.	310,518	328,106	17,588
Rails	..	..	Quintals	98,895	339,837	240,442
Clocks, &c.	..	..	Unity	329,357	360,545	34,188
Bottles	..	..	Quintals	49,767	61,988	12,221
Hardware	..	..	"	10,885	11,871	1,086
Worked jewellery	..	..	Francs	8,723,324	15,319,000	6,595,676

As a matter of fairness it would perhaps be more correct to take for comparison the acknowledged standard commercial year of 1886 rather than the exceptionally unfavourable one of 1888. Comparison with normal commercial year of 1886. Cotton.

According to this standard the increase in cotton tissues shown above amounts to only 75 per cent. of the amount imported in that normal commercial year. The Italian Government hope that, in spite of the concessions made by the recent treaty with Switzerland, the present duty will be sufficient to ensure the manufacture at home of the bulk of these goods used in the country. Up to the present time foreign goods, especially those of Great Britain, have competed successfully with native industry; but the steady increase of raw material imported, exceeding in 1889 by 123,000 quintals the amount imported in the preceding year, looks as if this industry was undergoing considerable development.

The above remarks apply with equal force to the import of Wool. woollen tissues.

With regard to manufactured silk goods, the 310,518 kilos. Silk. imported in the past year represent hardly three-fifths of the import of the normal year (1886).

The decrease in the import of rails is partially attributable to a diminution in the fever of railway construction, and partially to the fact that many orders were placed in Italy, notably at the manufactory of Terni. In 1882 Italy imported 1,332,670 quintals of rails, in 1883 1,185,740 quintals, and in the two succeeding years over 1,000,000 quintals each year, whilst in 1889 the amount did not reach 100,000 quintals. Rails.

The import of both scrap and pig iron shows an increase in value, the figures for the two years being as under:— Iron.

				Quantity.	Currency.	Sterling.
				Quintals.	Francs.	£
Scrap iron—						
1889	..	..	..	1,572,278	12,578,224	503,128
1888	..	..	..	1,645,710	11,519,970	460,798
Difference as against 1888				..	1,058,254	42,330
Pig iron—						
1889	..	..	..	1,686,773	14,387,570	573,502
1888	..	..	..	895,633	6,269,431	250,777
Difference as against 1888				+ 791,140	+ 8,068,139	322,725

Machinery

The import of manufactured iron and steel goods shows but an inconsiderable augmentation. Copper, brass, and bronze, however, and ingots were imported in 1889 to the value of nearly 80,000*l.* more than in the preceding year, the amounts imported being, roughly, about 24,000 quintals more than in 1888. Machinery, especially such as is connected with spinning and weaving, showed a large increase, as did also the import of railway plant. This last item applies more especially to tenders and merchandise trucks, which figure in 1889 for nearly 6,000,000 fr., or 240,000*l.*, in excess of the previous twelvemonth. The establishments at Milan and other places are able to furnish passenger carriages of good workmanship at easy rates, but not merchandise wagons, which are still imported largely from Germany and Belgium.

Exports.

The excess of imports over exports then, of some 400,000,000 fr., or 16,000,000*l.* (exclusive of precious metals), may be considered as about normal, for Italian produce and manufactures can never be exported to equal either in quantity or value the goods she receives from Great Britain, France, Belgium, Austria, Germany, and Switzerland: the more so as she is dependent on foreign States for her raw material, of which in 1889 the importation attained very large proportions, such as coal, 108,000,000 fr., or 4,320,000*l.*; raw cotton, 90,000,000 fr. or 3,600,000*l.*; raw silk, of the value of 74,000,000 fr., or 2,960,000*l.*; wool, 25,000,000 fr., or 1,000,000*l.*; about 1,200,000*l.* of scrap and pig iron, 500,000*l.* of oleaginous seed, and so forth.

With regard to the 950,475,905 fr. (38,019,036*l.*) worth of merchandise exported in 1889, 271,000,000 fr., or 10,840,000*l.*, consisted in articles of food, being 30 per cent. of the total; 530,000,000 fr., or 21,200,000*l.*, equal to 55 per cent. in raw and semi-prepared materials; and 150,000,000 fr., or 6,000,000*l.*, *i.e.*, only about 15 per cent., representing manufactured articles. The former two categories may consequently be said to represent the export of the country.

It is worthy of note that of the 58,500,000 fr., by which the exports of 1889 were estimated to exceed those of 1888, 40,000,000 fr., or 1,600,000*l.*, were due to the rise in price, especially as regarded wine, cocoons, raw silk, and animals, and a little over 18,000,000 fr., or 720,000*l.*, represented an increase in quantity. It is difficult for Italy, taking into account the increased energy of production throughout Europe, and the intolerable apathy and carelessness of her own manufacturers, to hold her own, much more to acquire a better situation in the world's market. The variations in prices have, moreover, made sensible differences in the customs returns.

Olive oil.

Olive oil, which, for instance, a few years ago was worth on an average 170 fr., or 6*l.* 16*s.* per quintal, has now sunk to 4*l.* 16*s.* In former years, the admixture of cotton oil being unknown, the peasant got credit for producing a better article, and the cultivation of olive trees had not attained its present proportions. The price of sulphate of quinine for export has, in

consequence of British and German competition, ceased to be remunerative.

The decrease in the exports of rice and flour pastes is chiefly due to legislative regulations, under which these items cease to figure in a great measure as direct exports, but appear under the head of re-exported articles. Rice and flour pastes.

Since an import duty was placed on rice, the quantity for its brilliancy undergoes certain processes before it is re-exported. Such is also the case in regard to flour pastes. By a Ministerial decree of December 18, 1883, certain advantages were accorded to the import of grain for the purpose of conversion into pastes on condition of their re-export. The small quantity of native grain registered as used in making pastes is due to the superior hardness of foreign wheat. The proportions between foreign and native grain used in this manner during the past two years are given as under:—

EXPORT of Manufactured Pastes.

	1888.	1889.
	Quintals.	Quintals.
Made of foreign grain..	58,368	67,378
„ native „ ..	10,819	6,427
Total	69,127	73,805

The above figures are worthy of consideration, since during the last few years rice is calculated to have produced some 30,000,000 fr., or 1,200,000*l.*, to the Treasury, and flour pastes about 4,000,000 fr., or 160,000*l.*; whereas, in 1889, the two products together did not realise 1,000,000 fr., or 40,000*l.*

The export of wine, already declining in 1888, in spite of a Wine. favourable vintage, has received a further shock in 1889. This fresh fall is not so entirely due to the absence of a market in France, which has partially been provided against by securing new markets, or enlarging already existing ones, but rather to a bad vintage, which neutralised the effect of various measures which have been taken by the Government to alleviate the distress in the agricultural portions of the kingdom.

The statistical returns for the export for the two years are given as under:—

						Hectolitres.
1888	..	..	..	..	..	1,802,020
1889	..	..	..	..	..	1,408,977

The monthly average of exports, which, during the first eight months of the year, amounted to 140,000 hectolitres, fell to below 65,000 hectolitres during the last four—a result the more disheartening, as, given an average vintage, the export is generally

doubled during November and December. The destination of the wine exported in 1889 was as follows:—

	Hectolitres.	Per Cent.
America.. ..	479,009	34
Switzerland	336,722	24
France	172,253	12
Germany	137,883	10
Greece and Malta	112,691	8
Africa	70,949	5
Austria-Hungary	33,141	2
Great Britain	30,088	2
Other countries.. ..	36,241	3
Total	1,408,977	100

In order to appreciate the value of the above figures it is well to bear in mind that in 1887, out of an export of 3,582,104 hectolitres, France alone took 2,782,707 hectolitres; America, 268,819 hectolitres; and Switzerland, 165,253. Germany absorbed 92,385; Africa, 104,705; Greece and Malta, 67,694; Great Britain, 44,758; and Austria, 31,248 hectolitres.

Olive oil was exported in 1889 to the amount of 28,728 quintals in excess of the quantity sent abroad in 1888, with an increase in value of 3,447,360 fr., or 137,894*l*. The normal export, however, of this article should be about 800,000 quintals, the greatest market for which has always been France.

With the increased export of oranges and lemons there has been a further demand for syrups and essences made from them. The figures relating to them are as under:—

		1888.	1889.
Oranges and lemons ..	Quintals	1,652,669	1,942,524
Syrups	"	18,644	37,136
Essences	"	3,073	3,862

There was a moment when competition in these products was feared from the Levant and from South America. The attempt, however, seems to have failed, and the rupture of commercial relations with France does not appear to have affected this branch of trade, the markets for which are mostly Great Britain and North America.

The export of soap is not often alluded to, but the export more than quadruples the import, and the 35,000 quintals sent abroad in 1889 represent the highest figures yet reached.

In 1888 and 1889 over 50,000 quintals of raw silk were exported from Italy, which, together with the amount of cocoons, form nine-tenths of the products exported under the denomination of materials necessary for industries (about 320,000,000 fr., or

12,800,000*l.* sterling). The silk export is consequently in a very favourable condition, both in a raw and in a manufactured state, while the import is steadily decreasing.

The taste for Italian straw hats seems to be diminishing, as up to 1881 over 700,000 found their way abroad. The export has since then steadily decreased, and in 1889 did not amount to one-half of that figure. The large export of plaits of straw, which now amounts to between 9,000 and 10,000 quintals, looks as if foreign countries preferred manufacturing their own hats and bonnets in the fashion of the day.

The export of marble steadily augments. The figures for 1888 and 1889 are as below:—

				1888.	1889.
Rough marble	..	..	Quintals	539,610	639,150
Worked	..	..	"	525,935	631,886
				1,065,545	1,271,036

Showing an increase in 1889 of 205,491 quintals.

Sulphur was exported to the amount of 3,295,476 quintals in 1889, whereas up to 1886 the export never reached 3,000,000. The development of this traffic has been of great use to the Treasury, who in 1889, with a duty of 1 *fr.* 10 *c.*, or 11*d.* a quintal, have encashed 3,625,000 *fr.* (144,000*l.*).

With the exception of oranges and lemons and nuts, already alluded to, the export of all vegetable produce classed under the 14th category shows a marked decrease. The following table will show this clearly:—

					1888.	1889.
Cereals	..	..	..	Tons	62,372	33,676
Chestnuts	..	..	..	"	12,387	10,246
Potatoes	..	..	..	"	15,219	8,225
Rice	..	..	..	"	9,809	1,632
Flour	..	..	..	Quintals	33,364	9,379
Bran	..	..	..	"	25,373	5,472
Irish eggs	..	..	..	..	49,121	24,526
Carob beans	..	..	..	..	65,484	39,093
Almonds	..	..	..	..	82,438	68,958
Dried fruits	..	..	..	..	104,399	86,955
Prepared fruits	..	..	..	..	11,748	7,789
Seeds	..	..	..	..	49,258	27,175
Nut cakes	..	..	..	..	56,612	50,147
Greens	..	..	..	..	118,198	102,246
Forage	..	..	..	..	130,339	122,327
Fresh fruit	..	..	..	..	73,221	127,379
Walnuts	..	..	..	..	63,682	71,825

Annexed is a complete table of the value of the exports and imports between Italy and foreign countries for the year 1889, as

compared with 1888, in corroboration of the foregoing observations.

The further tables show the movement of trade between Italy and Great Britain during the same period.

Imports for Great Britain. Increase. The principal items in which an increase will be observed are heavy oils, sugar, sulphates, raw cotton, cotton tissues, raw hides, pig iron, iron plates coated with zinc and lead, iron and steel instruments, machinery, and coal.

Decrease. A decrease, on the other hand, is apparent in chemicals, fixed oils, jute tissues, scrap iron, worked castings, iron and steel in bars and plates, hammered iron and steel, starch, palm and cocoa-nut oil, and prepared fish.

Exports to Great Britain. Increase. Orange essences and juices, silk tissues, raw hides, minerals of all sorts, marble, fresh fruit, cheese, and worked coral show an increase exported in 1889.

Decrease. Wine and olive oil, tartar and lees of wine, alkaloids, raw hemp, charcoal, sulphur, oleaginous seeds and oil cakes, and eggs show a very considerable decrease.

The amount of customs and excise duties for the year 1889 amounted to 268,333,435 fr. (10,733,335*l.*), showing an increase of 62,937,305 fr. (2,517,532*l.*) over the amount received in 1888.

This revenue was gathered under the following heads.—

Source of Revenue.	1889.	
	Currency.	Sterling.
	Fr.	£
Import duties	247,647,668	9,905,906
Export "	6,372,375	254,895
Excise.. .. .	6,487,146	259,485
Stamps on mercantile transactions.. ..	1,529,495	61,179
Maritime fees.. .. .	5,150,208	206,008
Miscellaneous	1,146,553	45,862
Total	268,333,435	10,733,335

DIFFERENCES between Return for 1888.

Source of Revenue.	1888.	
	Currency.	Sterling.
	Fr.	£
Import duties	+ 59,113,172	2,364,526
Export "	+ 167,302	6,692
Excise.. .. .	+ 3,574,645	142,985
Stamps	+ 78,540	3,141
Maritime fees	— 28,711	1,148
Miscellaneous	+ 32,357	1,294

ROME.

13

	Imports.		Difference.	Exports.		Difference.
	Value of Imports for Year			Value of Exports for Year.		
	1889.	1888.		1889.	1888.	
I. Spirits, beverages, oils ..	34,235,160	32,342,165	+ 1,892,995	128,495,911	129,416,128	- 920,217
II. Colonial produce, drugs, tobacco ..	83,705,086	65,386,926	+ 18,318,160	6,670,939	5,306,281	+ 1,364,658
III. Chemical products ..	39,856,606	41,497,568	- 1,640,962	45,571,039	44,617,657	+ 953,382
IV. Colours for dyeing and tanning ..	23,249,261	21,940,954	+ 1,308,307	9,482,499	9,268,539	+ 213,960
V. Flax, hemp, jute ..	24,635,456	21,673,784	+ 2,961,672	41,284,887	42,773,851	- 1,488,964
VI. Cotton ..	172,255,380	134,203,303	+ 38,052,077	27,781,309	20,699,210	+ 7,082,099
VII. Wool, horsehair, hair ..	93,465,551	78,376,431	+ 15,089,120	10,026,945	8,489,354	+ 1,537,591
VIII. Silk ..	113,807,267	76,608,417	+ 37,198,850	353,166,242	309,546,011	+ 43,620,231
IX. Wood and straw ..	48,837,715	48,145,062	+ 692,653	37,474,890	40,607,343	- 3,132,453
X. Paper and books ..	11,340,228	11,310,192	+ 30,036	16,274,044	11,920,690	+ 4,353,354
XI. Leather (Pelli) ..	42,568,737	39,011,624	+ 3,557,113	22,907,831	19,329,673	+ 3,578,158
XII. Minerals, metals and their manufactures ..	194,625,032	174,877,252	+ 19,747,780	26,528,891	29,035,601	- 2,506,710
XIII. Stones, earth, pottery, glass ..	135,221,874	123,005,208	+ 12,216,666	50,770,869	48,978,353	+ 1,852,516
XIV. Cereals, flour, pastes, &c. ..	24,331,635	183,097,773	+ 60,833,862	74,609,145	81,362,144	- 6,752,999
XV. Animals and animal products ..	114,599,935	101,640,241	+ 12,959,694	92,778,371	83,885,620	+ 8,892,751
XVI. Miscellaneous ..	19,344,855	21,484,122	- 2,139,267	7,662,093	6,728,184	+ 933,909
Total for first 16 categories ..	1,390,679,788	1,174,601,582	+ 216,078,206	950,475,905	891,934,539	+ 58,541,366
XVII. Precious metals ..	49,612,800	67,030,400	- 17,417,600	55,058,100	76,478,700	- 20,420,600
General total ..	1,440,292,588	1,241,631,982	+ 198,660,606	1,005,534,005	967,413,239	+ 38,120,766

IMPORTS from Great Britain and British Possessions in Asia.

NOTE.—The small figures (1) and (2), when used, refer respectively to Great Britain and British possessions in Asia.

		1889.	1888.	Difference.
CATEGORY I.				
Spirits, Wines, Oils—				
Fixed oils	Quintals	29,449	37,216	— 7,767
Petroleum	" ..	9,910	12,897	— 2,987
Heavy oils	" ..	28,805	17,556	+ 11,249
Volatile oils and essences	Kilos. ..	2,365	2,705	— 340
CATEGORY II.				
Colonial Produce: Drugs,				
Tobacco—				
Coffee	Quintals	94,093	97,682	— 3,589
Scgar (1)	" ..	131,625	121,834	+ 9,791
" (2)	" ..	244,121	48,484	+ 195,637
Cacao	" ..	5,654	4,397	+ 1,257
Pepper and pimento (1) ..	" ..	11,299	6,912	+ 4,387
" " (2)	" ..	1,839	947	+ 892
CATEGORY III.				
Chemical Products—				
Acids	Quintals	3,065	3,198	— 133
Potash and soda, caustic				
(impure)	" ..	67,454	59,020	+ 8,434
Alkaloids	Kilos. ..	1,360	1,798	— 438
Oxides	Quintals	9,655	10,296	— 641
Carbonates	" ..	49,385	72,258	— 25,873
Chlorides	" ..	35,620	36,784	— 1,164
Nitrates	" ..	10,372	11,627	— 1,255
Sulphates	" ..	63,455	44,953	+ 18,502
Other chemical products ..	" ..	13,374	9,757	+ 3,617
Bark	" ..	4,691	2,532	+ 2,159
Gums and resins	" ..	14,509	17,730	— 3,221
Soap	" ..	4,421	5,221	— 800
CATEGORY IV.				
Colours, &c., for Dyeing				
and Tanning—				
Woods, barks, herbs, &c. (1)	..	13,885	15,553	— 1,668
For dyeing (2)	..	11,179	8,640	+ 2,539
Indigo (1)	..	1,362	1,447	— 85
" (2)	..	480	594	— 164
CATEGORY V.				
Flax, Hemp, Jute—				
Raw vegetable fibres (2) ..	Quintals	94,414	74,417	+ 19,997
Yarns of flax, hemp,				
and jute	" ..	2,490	2,531	— 41
Tissues of jute	" ..	2,387	4,269	— 1,932
Tissues of flax and hemp ..	" ..	2,280	2,040	+ 240
CATEGORY VI.				
Cotton—				
Raw cottons (1)	Quintals	48,742	30,151	+ 18,591
" (2)	" ..	443,528	358,756	+ 84,772
Yarns and twists	" ..	22,132	22,205	— 73
Cotton tissues	" ..	57,913	42,184	+ 15,729
" lace	Kilos. ..	19,175	20,410	— 1,235
CATEGORY VII.				
Wool, Horsehair, Hair—				
Raw wool	Quintals	4,567	5,260	— 693

IMPORTS from Great Britain and British Possessions in
Asia—continued.

		1889.	1888.	Difference.
Yarns	Quintals	4,183	2,663	+ 1,520
Woollen tissues	" ..	20,988	13,265	+ 7,723
CATEGORY VIII.				
Silk—				
Silk tissues	Kilos. ..	20,820	14,746	+ 6,074
Silk lace and tulle	" ..	2,433	3,189	— 756
Made-up articles	" ..	4,624	4,675	— 51
CATEGORY IX.				
Wood and straw—	Nil ..	..	..	..
CATEGORY X.				
Paper and Books—				
White paper	Quintals	1,060	1,323	— 263
CATEGORY XI.				
Leather—				
Raw hides (1)	Quintals	20,408	28,660	— 8,252
" (2)	" ..	30,382	14,653	+ 15,729
Tanned hides	" ..	2,779	1,791	+ 988
CATEGORY XII.				
Minerals, Metals, and their Manufactures—				
Scrap, filings, &c., of iron and steel	Quintals	914,698	1,069,360	— 154,662
Pig iron	" ..	972,525	336,263	+ 636,262
Worked castings	" ..	63,338	92,004	— 28,666
Iron and steel in bars	" ..	53,505	100,583	— 47,078
" " in plates	" ..	167,141	273,971	— 106,830
" " sheets	" ..	77,245	73,214	+ 4,031
" " tubes	" ..	26,214	27,408	— 1,194
Forged and hammered iron and steel	" ..	19,506	13,494	+ 6,012
Rails	" ..	8,905	30,380	— 21,475
Manufactured iron and steel	" ..	38,700	47,207	— 8,507
Iron plates, coated with zinc, lead, and plain	" ..	73,766	53,322	+ 21,444
Ditto, worked	" ..	3,768	3,568	+ 200
Steel, tempered	" ..	1,625	2,189	— 564
Tools and instruments of iron and steel	" ..	2,116	2,962	— 846
Copper, brass, or bronze ingots	" ..	32,437	10,771	+ 21,666
Ditto, worked	" ..	17,709	15,566	+ 2,143
Lead in ingots	" ..	2,745	2,630	+ 115
Zinc, scrap	" ..	2,215	1,610	+ 605
" worked	" ..	6,581	2,504	+ 4,077
Machinery	" ..	141,834	118,861	+ 22,973
Optical instruments	" ..	778	837	— 59
CATEGORY XIII.				
Stones, Earths, Pottery, Glass—				
Chalk, lime	Tons ..	9,016	8,959	+ 57
Bricks, tiles, &c.	Quintals	134,326	128,793	+ 5,523
Coal	Tons ..	352,0362	3,444,622	+ 75,740
Pottery	Quintals	3,256	3,203	+ 48

IMPORTS from Great Britain and British Possessions in
Asia—continued.

		1889.	1888.	Difference.	
Majolica	Quintals	295	653	—	358
Earthenware	" ..	1,598	1,517	+	81
Sheet glass and mirrors ..	" ..	9,081	8,497	+	584
Worked glass, crystal ..	" ..	2,249	2,357	—	108
CATEGORY XIV.					
Cereals, Flour Pastes, Vegetable Products—					
Wheat (2)	Tons ..	32,376	69,827	—	37,451
Rice (2)	" ..	4,196	5,018	—	822
Fecula glucose (1) ..	Quintals	10,617	10,689	—	72
" " (2)	" ..	17,639	4,358	+	13,281
Starch	" ..	3,167	2,459	+	708
Oleaginous seeds (1) ..	" ..	11,834	49,287	—	37,453
" " (2)	" ..	389,533	247,013	+	92,520
Palm and cocoanut oil (1)	" ..	14,712	21,164	—	6,452
" " (2)	" ..	969	12,334	—	11,365
Not named vegetable produce	" ..	5,389	4,687	+	842
CATEGORY XV.					
Animals, and other Animal Products—					
Prepared fish	Quintals	188,021	149,334	--	11,313
Fats of all kinds	" ..	20,626	11,110	+	9,516
Stearic acid	" ..	10,071	5,803	+	4,268
Manure	Tons ..	4,195	3,107	+	1,088
CATEGORY XVI.					
Miscellaneous—					
Hardware	Quintals	1,058	818	+	240
Raw gutta-percha	" ..	2,546	1,481	+	1,065
Worked "	" ..	334	309	+	25
Hats and bonnets ..	Per 100 ..	1,228	984	+	244

EXPORTS from Italy to Great Britain.

		1889.	1888.	Difference.
CATEGORY I.				
Spirits, Wines, and Oils—				
Wine in casks	Hectolitres	30,088	70,249	— 40,161
Olive oil	Quintals..	107,578	142,118	— 34,540
Orange essences	Kilos. ..	113,271	97,482	+ 15,789
CATEGORY II.				
Colonial Produce, Drugs—				
Preserves and sweetmeats	Quintals..	1,751	2,080	— 329
Unspecified	„ ..	1,073	1,270	— 197
CATEGORY III.				
Chemical Products—				
Boric acid	Quintals	13,347	6,912	+ 6,435
Alkaloids	Kilos. ..	3,841	11,962	— 8,121
Marine and rock salt ..	Tons ..	6,409	8,819	— 2,410
Tartar and lees of wine ..	Quintals..	44,043	61,532	— 17,539
Orange and lemon juices ..	„ ..	21,476	10,890	+ 10,686
Liquorice and aloes	„ ..	4,905	6,282	— 1,387
Soap	„ ..	12,803	14,912	— 2,109
CATEGORY IV.				
Colours for dyeing, tanning				
woods, lichens, &c. ..	Quintals	147,696	125,544	+ 22,152
CATEGORY V.				
Flax, Hemp, Jute—				
Raw hemp	Quintals	92,152	128,824	— 36,672
Hemp, flax, jute (carded)..	„ ..	1,868	1,541	+ 327
Yarns	„ ..	12,325	10,466	+ 1,859
CATEGORY VI.				
Cotton	..	..	..	..
CATEGORY VII.				
Wool, Horsehair, Hair—				
Wool, bleached and un-				
bleached.. ..	Quintals..	3,098	683	+ 2,415
CATEGORY VIII.				
Silk—				
Raw, thrown silk	„ ..	2,987	3,569	— 602
Tissues of silk	Kilos. ..	51,218	36,086	+ 15,132
CATEGORY IX.				
Wood and Straw—				
Charcoal	Tons ..	39	6,775	— 6,736
Roots for brushes.. ..	Quintals..	3,609	9,025	— 5,416
Straw hats.. ..	Per 100 ..	2,230	1,562	+ 668
CATEGORY X.				
Books and paper	..	..	..	..
CATEGORY XI.				
Leathers—				
Raw hides	Quintals..	29,532	15,865	+ 13,667
Gloves	100 pairs	1,276	3,833	— 2,557
CATEGORY XII.				
Minerals, &c.—				
Minerals of all sorts ..	Tons ..	101,718	72,678	+ 29,040

Exports from Italy to Great Britain—continued.

				1889.	1888.	Difference.
CATEGORY XIII.						
Stones, Earth, &c., Glass—						
Rough marble	..	..	Tons	17,937	17,021	+ 916
Worked "	..	..	Quintals	209,126	167,659	+ 41,467
Chalk, lime	..	..	Tons	16,995	6,540	+ 10,455
Sulphur	..	..	Quintals	892,247	405,038	- 12,791
Pottery (2)	..	..	"	1,812	129	+ 1,681
Glass (1)	..	..	"	7,832	11,435	- 3,603
" (2)	..	..	"	10,917	10,183	+ 734
CATEGORY XIV.						
Cereals, Flour, &c.—						
Flour	..	..	Quintals	187	4,254	- 4,067
Bran	..	..	"	..	1,832	- 1,832
Flour paste	..	..	"	290	737	- 447
Oranges and lemons	..	..	"	322,342	288,191	+ 34,151
Dried fruits	..	..	"	16,966	16,340	+ 626
Prepared vegetables	..	..	"	505	1,890	- 1,385
Oleaginous seeds	..	..	"	3,537	7,746	- 4,209
Oilcakes	..	..	"	..	5,000	- 5,000
Other vegetable produce	..	..	"	6,262	13,107	- 6,845
CATEGORY XV.						
Animals and Animal Produce—						
Prepared fish	..	..	Quintals	3,424	2,321	+ 1,103
Butter	..	..	"	7,620	6,521	+ 1,099
Cheese	..	..	"	15,203	11,012	+ 4,191
Eggs	..	..	"	72,040	81,960	- 9,920
Coral, worked (2)	..	..	Kilos.	52,285	46,582	+ 8,703

HENRY NEVILL DERING.

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DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

ITALY.

REPORT FOR THE YEAR 1889
ON THE
TRADE OF GENOA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 507.

Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1890.

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ITALY.

GENOA

Consul Yeats Brown to the Marquis of Salisbury.

My Lord,

Genoa, March 25, 1890.

IN accordance with paragraph 8 of the General Instructions to Her Majesty's Consuls, I have the honour to inclose my Annual Commercial Report for the year 1889.

I have, &c.

(Signed) M. YEATS BROWN.

*Report on the Trade of the Consular District of Genoa for the
Year 1889.*

In my report on the trade of this district for the year 1888 I had occasion to remark that, although the general trade of Italy had suffered grievously from the war of tariffs with France and other causes, there had been no corresponding falling-off in the trade of this port, and the same observation holds good for this year. From various causes neither trade, industry, or agriculture are in a satisfactory condition in Italy generally; but Genoa, mainly owing to its geographical position at the extreme north of the Mediterranean; continues to flourish; and the returns for 1889 show an increase in both imports and exports, in the tonnage of shipping, and in the receipts of the custom-house, and at the same time the local industries have, in the aggregate, considerably augmented their production. Agriculture, it is true, has been greatly depressed, the wine and the oil crop having both been failures, but then this is not an agricultural but essentially a trading district, and even the rural population do not, in the main, depend upon the crops for their maintenance, it being in the nature of the only two crops cultivated—namely, wine and oil—not to give employment to able-bodied men for more than a very few weeks in the year.

In attributing the increasing prosperity of Genoa to its geographical position, I do not wish to cast a slur on the proverbial industry, energy, and intelligence of the Genoese, but

what I do say is, that in spite of all these undeniable qualities the harbour arrangements are in all respects (except area of water), and also the railway service, so far below modern requirements, that but for this favourable position trade would have left them long ago, instead of continuing somewhat to increase. They will, however, do well not to be deluded into security and rely too much on their natural advantages, for trade is every year more keenly competed for, and shipowners and merchants are quite ready to profit by even a few centimes per ton afforded to them by greater facilities for discharge, or greater rapidity in forwarding their goods, and the present arrangements at Genoa for the one and the other are simply a crying scandal and shame. Enormous sums of money have been spent, and the area of water now inclosed by the harbour is amply sufficient, not only for the actual trade of the place, but for double the amount if only it were properly utilised. Instead of this there are no docks; the quay space is so badly planned that few vessels can lie alongside; the cranes are so badly placed that the greater part of them lie idle; and the discharge of cargo goes on, just as it did 20 years ago, into lighters which block up the port, and which, in their turn, cannot be got alongside to discharge; and above all, the utter apathy and incapacity of the railway company to deal with the traffic is such that, unless this most important point is radically reformed, no other improvements can have due effect. There has been for years a constant cry against the insufficiency of the rolling stock, but the fact is that what is wanted is not a greater number of waggons but that these should be forwarded, discharged, and returned empty for use. Were the number of waggons doubled to-morrow it would only increase the existing confusion, and in no way solve the difficulty. What is wanted is a traffic manager experienced in managing a large and increasing movement of goods; and if, as is probable, Italy is not at present capable of producing the right man, he should be imported from England, Belgium, or Germany, and until things are put right he should be supported by the full strength of the Government, for the importance of not letting the trade of the "First Port of Italy" slip away, makes it a matter of national and no longer merely local interest.

Customs and
other dues.

The receipts of the Genoa custom-house for the last three years have been as follows:—

	1889.	1888.	1887.
	£	£	£
For import dues ..	3,195,052	2,580,719	3,847,481
„ export dues ..	1,655	2,496	2,163
„ harbour dues ..	81,584	80,542	} 111,440
„ various dues ..	80,561	28,622	
Total ..	3,308,852	2,692,379	3,961,084

The total tonnage of shipping at this port has again increased, Shipping. and has reached a considerably higher figure than in any previous year.

The tonnage of arrivals was in—

						Tons.
1889..	..	..	..	..	..	3,331,848
1888..	..	..	..	..	..	2,993,562
1887..	..	..	..	..	..	2,962,354
1886..	..	..	..	..	..	2,748,905

Our shipping, which had fallen-off considerably in 1888, has picked up again, though it has failed to reach, either in number of vessels or tonnage, the unusually high figure at which it stood in 1887, the arrivals having been in—

				Vessels.	Tons.
1889	..	..	..	1,026	1,156,217
1888	..	..	..	951	1,045,800
1887	..	..	..	1,114	1,192,695
1886	..	..	..	956	1,003,729

The increase in British shipping was chiefly due to the enormous import of British coal, which this year amounted to nearly 1,300,000 tons.

German tonnage also increased, having reached a total of 189,690 tons, against 163,653 tons in 1888; and their increase is in passenger vessels on the regular lines to China and Australia.

French tonnage, on the other hand, fell off still further, having only reached a total of 192,480 tons, as against 264,867 tons in 1888; and, were it not for the part the French take in the emigration to South America, their tonnage would now be altogether of insignificant amount.

The imports in the "Commercio Speciale," or home trade Imports and (exclusive, therefore, of transit), according to the best estimate I exports. can make, were of a total value of 20,276,465*l.* in 1889, against 15,776,308*l.* in 1888, and 14,731,350*l.* in 1887; and the value of the exports was 4,669,575*l.* in 1889, against 3,923,681*l.* in 1888, and 3,255,649*l.* in 1887. The values are no longer fixed at Genoa, but in Rome, and I can only, therefore, get the quantities from the custom-house here, and fix a value for myself, a process which infinitely increases the labour of compiling these statistics, and renders them no longer an official version. In any case, it is the best attempt I can make towards giving a rough comparison of the trade in 1889 with that of previous years; and I am always more disposed to place reliance on such information as I can get from merchants and others interested in the different articles than on the official returns, which are never thoroughly trustworthy.

I annex, as usual in my annual report, such details of trade as I have been able to procure from trustworthy sources, taking the (859)

different articles in the order in which they come in the custom-house returns, which divide all goods into 17 categories.

Wine, oil, &c.

The export of wine has increased, and though, as I have before pointed out, this is not at all one of the chief ports of this trade, the export from hence in 1889 was 2,673,000 gallons in cask, against 1,598,000 gallons in 1888; and the export of bottled wine, also, rose to 2,501,700 bottles in 1889, against 2,318,100 bottles in 1888. Fully two-thirds of the whole export of wine from hence is for the River Plate. The import of wine is insignificant, and almost limited to sweet wines from the south of Spain, which are used for making the "Vermouth," for which Turin is especially famous.

The export of olive oil was of 9,297 tons in 1889, as against 4,455 tons in 1888, and 5,262 tons in 1887. The increase is due to the good crop of 1888-89, and, as it appears by the custom-house returns that the imports of cotton and other "mixing" oils fell off, consumers may fairly hope that they have this year been supplied with the real unadulterated article, or at any rate a nearer approach to it than usual.

Petroleum.

The import of American oil was 5,120 barrels and 918,111 cases in 1889, against 12,011 barrels and 811,652 cases in 1888; with a stock in store on December 31, 1889, of 2,315 barrels and 138,678 cases, against 4,092 barrels and 42,272 cases at the same date the previous year.

The import of Caucasus oil in 1889 was 30,800 quintals in bulk, and 2,415 barrels, against a total import in 1888 of 33,577 cases—none having been shipped in bulk until the year 1889. Of the imports in 1889, 19,000 quintals and 100 barrels were still in store on December 31.

The new storehouse for petroleum in bulk was opened last summer, and has been hired from the municipality at a considerable rental by a German firm who are agents for the great Caucasus house of Noble and Co., and now, for the first time, the competition of this oil against Pennsylvanian oil will be fairly tried. Opinions seem divided on the subject, but if one may judge by the results obtained at Venice, where the Causasus oil has for some years been imported in bulk, it ought to be a success here also; and it is a fact that in 1889, while the price of Pennsylvanian oil rose considerably in America, it did not make the slightest upward move on this market.

Colonials.

The import of sugar in 1889 increased considerably as compared to the previous year, though it did not nearly come up to the amount of 1887, which was enormously great in expectation of duties being raised.

The quantities entered for home consumption in 1889 were 42,700 tons, against 34,200 tons in 1888 and 94,400 in 1887. The import continues to be almost entirely of low class sugars for the local refineries, which, under the protective duties, have the whole trade in hand.

Coffee.

The import of coffee was of about the usual amount, the

quantity entered for home consumption in 1889 was 6,464 tons, against 6,993 tons in 1888 and 5,557 tons in 1887.

This trade is now reduced to purely retail business, and is entirely in the hands of small importers, whose supplies are limited to their immediate wants. The stock in store at present consists of about 1,500 bags, whereas in byegone years, when Genoa was an emporium of "colonial" goods, the stock averaged fully 80,000 bags.

The import of chemicals, as a whole class, has somewhat increased, and a new trade of considerable importance to England has sprung up in sulphate of copper, which is now largely used in this district and throughout Upper Italy as a remedy against the vine disease. A little is made at Pont Saint Martin in the Alps, by the Elletro Littica Company, but almost the whole trade is supplied from England, chiefly Swansea, and the demand is likely to increase. Prices, too, are very good, as this article a few years ago, at the present price of copper, would have been worth only about 17*l.* a ton, and it sells here at 26*l.* Chemicals.

The import of tobacco—all, of course, for the Government Regie—amounted to 5,600 tons in 1889, as against 5,790 tons in 1888, and 3,800 tons in 1887. Tobacco.

The import of raw cotton in 1889 was considerably larger than in 1888, and greater in fact than in any previous year. The imports by sea were as follows:— Cotton.

	1889.	1888.
	Bales.	Bales.
From America	98,066	95,119
" India	138,993	113,424
" Egypt	24,757	24,189
" Marsilles	5,604	605
" Levant	1,249	999
" England	8,841	10,370
Sundries	662	1,404
Totals	278,172	246,110

The import of yarns in 1889 has again decreased, but, as I have before noticed, owing to the through route arrangements, such goods are now sent to the manufacturing towns in Upper Italy by rail and not by sea.

The import of manufactured goods has considerably increased in 1889, as compared to the previous year, and this, in spite of great activity in the manufacturing districts of Upper Italy and on this coast.

The export of cotton goods, and especially of made-up goods, shirting, &c., for South America, has also considerably increased.

The import of raw wool from the River Plate in 1889 consisted of 3,358 bales of wool, and 9,267 bales of sheepskins, against 4,693 bales of wool, and 3,465 bales of sheepskins in 1888. Wool.

There is no import except from the Plate, as there is only one considerable wool-spinning mill in this district, and the imports for (859) A 4

the mills in Upper Italy now all go there from the north of Europe by railway. Even for the one mill here the combed wool from Roubaix, Tourcoing, &c., is imported by rail, and no longer by sea.

The import of woollen yarns and manufactures of wool has been of about the usual amount. Our goods, which had, in the beginning of the year, benefitted by the exclusion of our French competitors during the war of tariffs, felt the effect of their re-admission to the ordinary tariff; but I am also told by importers that our manufacturers are apparently so full of orders that of late they do not show any great "empressement" to undertake commissions from here. On the other hand I am happy to learn that some articles, which dealers here, attracted by lower prices, had been accustomed to import from Germany, are now exclusively ordered in England; and, indeed, that our goods are found to wear so much better that almost all tailors' goods are now sought from England, with the exception of beavers and such cloths for overcoats, for which the German quotations are so infinitely lower than ours that hardly any orders can be obtained.

The export of woollen goods from this port to South America is on the increase, goods being prepared expressly for the consumption, and to suit the taste of the large Italian colony on the River Plate.

Hides.

The import of hides again increased in 1889. The total of hides and skins together entered for home consumption in that year having been 8,292,700 kilos. against 5,111,800 kilos. in 1888.

Metals.

Considering the very great increase in the number of foundries and metal works of various kinds established in this district of late, and their great and increasing industry under the protective duties imposed by the last tariff, it is somewhat surprising to find that the returns of the custom-house do not show any great variation in the imports. The following statement gives the quantities entered for home consumption, but it must be noted that while all the imports by sea figure in this statement, those by way of land are only given in part, as some are cleared, and pay duty at the frontier, and no account of these is kept here.

Articles.		Years.		
		1887.	1888.	1889.
Old iron	Tons ..	47,660	68,890	51,000
Pig "	" ..	24,214	14,551	13,000
Cast iron, manufactures of ..	" ..	1,650	1,273	1,360
Wrought iron bars, sheets, &c. ..	" ..	19,847	18,490	17,650
" " finished	" ..	2,758	3,494	3,010
Rails	" ..	11,455	2,156	2,520
Tin plates	" ..	5,488	3,817	5,170
Copper and brass, pig, old, &c. ..	" ..	1,234	777	1,990
" " manufactured ..	" ..	1,639	1,230	1,160
Tin, bar, broken, &c. ..	Value £	69,530	83,518	91,692
Machinery	" £	272,372	472,170	488,640

The machinery is chiefly for the foundries and engineering Machinery. works in this district, being in part for setting-up their own machinery with which afterwards to compete against us, and also pieces of marine and other engines which they have orders for, and which they are not yet in a position to complete in their own works. The greater part of this import is from England.

As regards steel castings and shafting some of the establish- Steel. ments are getting them from Germany, where, they say, the quality has much improved of late, and prices are lower, but others stick to their English correspondents and prefer to pay a somewhat higher price and get thoroughly reliable goods. Steel boiler plates can still be had from Glasgow as cheap as from anywhere, and are the best; but on the other hand I am informed that the contracts for the heavy plain plates for boilers of the Government ships are to be given to Terni, and that those that are required flanged or worked will be ordered in Germany. The lighter boiler plates and ship plates are now made extensively here by Messrs. Raggio and Co. and others; and thin steel plates are also made at Sestri and at Rivarolo, where an English manager is said to turn out good work for Messrs. Dufour and Co. Works for making the delta metal, on Mr. Dick's patent, have been set up at Cornigliano, and have contracted for the propellers of the "Liguria" and "Marco Polo" Government ships, and undertake other important orders. Iron galvanized roofing, both plain and corrugated, is now made at Sestri, and iron and steel wire is made in Turin. At Milan, again, extensive plant has been put down for making steel castings, and work will shortly commence there, orders being meanwhile solicited at very low rates in order to establish business.

The import of anchors and chains has been considerable in 1889, owing to the demand for Government and other vessels Anchors and chains. building, and this branch of trade, at least, is still entirely supplied by our manufacturers.

The import of yellow metal has been gradually and steadily Yellow metal. diminishing, but a moderate supply was still imported for some of the wooden ships, which, though in good condition, had been lying idle while low freights prevailed.

The import of tin plates was rather smaller than in 1888, but Tin plates. only because the stock in store was considerable. The demand for tin plates is sure to increase, as they are largely used by the food-preserving establishments, and a new and large demand will arise here and at Savona for the Caucasus oil cases.

I see by the papers that a company for the manufacture of this article at Brescia has been floated in England, and the duty is so high that the temptation to try to make tin plates in this country is evident, but the question is, Can they be successfully made out of England? The answer will be of vital interest to the shareholders in this new Company.

The import of British coal has again increased over all Coal. previous years, having been 1,292,000 tons in 1889, against 1,279,000 tons in 1888, and 1,196,000 tons in 1887. Of the

above total import in 1889, 648,600 tons were from Cardiff, 472,200 tons were from Newcastle, and the rest was Scotch and North English coal from Liverpool and from Hartlepool. The whole import, with the exception of about 26,000 tons which was brought under the Italian flag, came by British steamers.

Coal freights averaged during the year, from Cardiff to Genoa 11s. 2d., and to Savona 11s. 4d. per ton; and from Newcastle to Genoa 9s. 4d. per ton, and to Savona, 9s. 8d. per ton; the highest freights from Cardiff having been fixed in April, and from Newcastle in November; the lowest freights for both ports being in the month of August.

Corn, grain,
&c.
Wheat.

The import of wheat in 1889 rose to 300,652 tons, against 226,000 tons in 1888, and 272,500 tons in 1887. This is partly attributable to deficient crops in Upper Italy, but also to the constantly increasing production of "paste" (macaroni, vermicelli, &c.) in Genoa and at Nervi. The great market for this excellent food is South America; but I believe I am right in saying that the Genoa make is preferred also in Europe to that of its great rival, Naples.

Paste.

The export of "paste" in 1889 rose to 1,719 tons, as against 1,296 tons in 1888.

Rice.

The import of rice in 1889 was enormous, and considerably in excess of the requirements of the market, so that before the close of the year considerable parcels were re-exported to North Europe without having been cleaned. The total import was 83,000 tons, of which 56,000 tons were from Japan, and 23,000 tons from Burmah.

The rice-cleaning industry is at present alarmed at the prospect of a contemplated modification of the customs regulations concerning the temporary import of rice for cleaning purposes, fearing, or pretending to fear, that if the proposed regulations become law, their industry will be destroyed.

Fish.

The import of codfish of French and English cure respectively has been as follows during the last three years:—

Year.					French.	English.
1889	..	..	..	Kilos...	681,060	Quintals. 57,564
1888	..	..	..	Bales ..	5,656	70,887
1887	..	..	..	" ..	27,215	61,841

The differential duties in the beginning of the year told against French fish, inducing merchants to seek other sorts, and consequently they went in for purchases of Iceland fish; but the quality of these importations turned out no better than English fish, and difficulties and litigation ensued. Later on the differential duties against France having been abolished, the demand for French fish became more general, and large imports took place, which, with all the other kinds of salt fish on the market, caused stock to be very heavy on hand at the close of the year; and the

position was much aggravated by the prevalence of influenza, and the consequent papal dispensation which permitted the use of meat. Sales were very difficult at the close of the season, and considerable quantities were re-shipped to Spain.

The receipts of Iceland fish consisted of 18,592 quintals direct Iceland fish. in eight cargoes, and 10,000 cases via Denmark and Liverpool.

The total import of herrings for the season 1889-90 was Herrings. 28,132 barrels and 5,107 half barrels, against 26,211 barrels and 4,908 half barrels in the season 1888-89; and prices were even lower than 20 lire per barrel, the lowest of the previous season.

The total import of pilchards for the season 1889-90 was Pilchards. 105 hogsheads and 16,574 half hogsheads, against 399 hogsheads and 23,919 half hogsheads in the season 1888-89; and prices have been very low, and now, at the close of the season, have fallen to an absolutely ruinous point. On the whole the market has been terribly against importers of all qualities of fish during this season.

The iron works of this district have been in active work Industries. throughout the year, and have considerable orders on hand. Messrs. Ansaldo and Co., who now employ more than 2,000 hands on their two establishments, turned out no less than 40 locomotives in 1889 at Sampierdarena, besides several sets of small marine engines and the great 20,000 horse-power engines for the ironclad "Sicilia," which is building at Venice; and they have in hand the engines for three large and four smaller Government vessels, as well as three large sets of engines for the "Navigazione Generale" Company, and two for the ships now on the stocks at their establishment at Sestri. At this latter place they launched, in 1889, two steel sailing ships, one of which, the "Catterina Accame," was the first steel ship built in Italy; besides several steel pinnaces for Government, a floating crane of 120 tons for Genoa, and other important work. And they have now on the stocks two large and two smaller steel sailing ships, two mercantile steel steamships, two large and four small Government vessels, and several other orders which will extend beyond the close of the year.

Messrs. Odero and Co., who employ about 600 hands, turned out of their works at Sestri during 1889 three torpedo boats, four barges, and about 23 sets of pinnace engines for the Government, besides about eight sets of land engines for mills, &c., from 20 to 100 horse-power, and various other work; and they also are full of orders extending beyond the current year, having on hand for the Government four torpedo boats of the Schickau type, and one larger one of the type of the Tripoli, a steel sailing ship, and other work for the merchant navy, and a number of land engines and boilers.

The great works at Savona, under the firm of Tardy, Benecke and Co., but now worked by German capital and under German management, are chiefly employed in making steel rails, but they also manufacture heavy ship plates, employing fully 1,500 hands. They also have been, and are, full of work, though it is said the shareholders are not to have the dividends expected.

Besides these great works, the establishments of Messrs. Cravero and Co., Raggio and Co., Balleydier and Co., Wilson and Maclaren, Dufour and Co., and many other smaller firms have all been actively employed, the high tariff and premiums on shipbuilding giving them such ample protection that, as long as the country chooses to favour them at the expense of the public purse, they are enabled thereby to compete against our cheaper prime materials, and our more practised skill as manufacturers.

All other industries have been quite eclipsed, as far as this coast is concerned, by the extraordinary development acquired by metal works and engineering establishments; but the smaller industries have also been actively employed, and working full time, in general, throughout the year; and although the dividends given by some of the large concerns, such as the refineries, will, it is said, be small, the year has, on the whole, been a prosperous one, and the labour class, at any rate, has had nothing to complain of.

There have been few disputes between employers and their hands and two very short strikes, but in each case the differences were promptly settled, and on the whole a very good feeling exists between capital and labour in this town and neighbourhood. At Savona, on the other hand, it is said relations are somewhat strained between the German management of the great iron works and their native hands, who, accustomed as they have been to mild rule and gentle treatment, are disposed to resent the present sterner régime which to them seems to savour of despotism.

Public works.

Beyond some small improvements in the main access to the harbour, and laying out a few new streets in the remoter parts of the town, public works have been at a complete standstill during the year as far as the interior of the city is concerned. Many grand projects have been discussed but nothing has been done, not from financial or other difficulties, nor for want of earnestness, or carelessness, or ignorance; but just because in Genoa it seems sufficient for any man, or set of men, to wish to carry out a thing one way, for others immediately to determine either that that thing shall not be done at all or shall be done in some quite different way. So it is that we have no docks as yet and no near prospect of them, though the great Cavour, who died in 1860, found plans already matured for them, and over and over again impressed on the Genoese the urgent expediency of at once building them before Marseilles should filch away their trade, and promised his support to any plan they might decide upon and approve. So it is with the splendid harbour now inclosed, mainly through the munificence of the late Duca di Galliera, the quays are mere great open spaces on which coal, iron, cotton, and perishable goods are heaped up in confusion and exposed to the caprice of the weather, to fire, and to theft, and the discharge and shipment of goods is still done by lighters hauled alongside, and by hand labour. And so, above all, it is that the railway arrangements are in all respects utterly inadequate to the trade of the port (even as it now exists), that they have become a perfect

scandal and a shame to all Italians, and a laughing stock of all those foreigners whose interests are not involved. The one important railway improvement effected in 1889 was the opening of the supplementary line from Rivarolo to Novi, which has had the effect of considerably lightening the traffic on the "Giovi" incline, and has increased the speed of the passenger trains, which now follow the new route.

There is no increase in the resident population of Genoa, the municipal statistics giving the number on December 31, 1889, as 204,738, as against 204,715 at the same date the previous year. This gives a quite erroneous idea of stagnation, whereas the life and activity of the place increases fast, and the fact of the non-increase in resident population is due solely to the want of accommodation for the working classes, who are obliged to walk miles to and from their daily labour. The apathy and procrastination of the municipality are incredible, and it now appears that some of the important works already approved for the improvement of the town are to be again postponed, if not abandoned. The question of lodging for the labouring classes is increasing in gravity, and just indignation is felt by them at the neglect of their interests, for there would be no difficulty in providing them with houses within reach of their work if the municipality would decide on the street plans, and thus enable builders to begin work. There are plenty of people ready and willing to buy the land and build at once, for there is no better investment for money, but nothing can be done until the street plans are decided upon and approved by the authorities.

Temporarily, at any rate, the number of emigrants to South America from this port has declined, the numbers having been as follows in the last five years:—

	Total.					
1885	..	..	..	..	..	71,100
1886	..	..	..	..	..	52,852
1887	..	..	..	..	..	101,280
1888	..	..	..	..	..	181,437
1889	..	..	..	..	..	112,566

The destination of the above number in 1889 was as follows:—

Buenos Ayres	..	..	..	..	..	80,137
Montevideo	..	..	..	..	..	15,076
Rio de Janeiro	..	..	..	..	..	8,471
Santos	..	..	..	..	..	8,685
All other places	..	..	..	..	..	197

112,566

The number would have been far greater to Brazil but for the decision of the Ministry, arrived at in the summer, to prohibit, absolutely, any further emigration to that country, owing to the prevalence at that time of yellow fever. As I mentioned in my last report, contracts had been signed for the transport of 350,000 emigrants in the next six years to Brazil, and the

decision of the Government has entailed a very serious loss of business to Italian shipping.

The current of opinion in Government circles seems to be against emigration, with a view to keeping the population at home for the sake of agriculture, but the fact is that neither peasant nor landlord can any longer live against the competition of cheap seaborne food, and emigration is bound to continue, and even to increase, unless the land can be lightened of the enormous taxation which oppresses it, and is gradually making it impossible to get a living even in the most fertile provinces of Italy.

Money
market.

"Rente" was lower in 1889 than the year before. The highest price of 1889, which was reached in May, did not exceed 98.50, while in August, when the crisis at Turin spread considerable alarm, the quotation was under 94. From this point there was a steady recovery, and the closing price of the year was 96.70, or only about 1 per cent. lower than at the end of 1888. It is, in fact, surprising that the "rente" should have suffered so little, considering the very heavy depreciation that took place during 1889 on the shares of all the financial institutions in Italy.

This was due to the collapse of the land and building speculations which had been carried on for several years in Rome and Naples to an enormous extent, and almost entirely on borrowed money, so that when at last the lenders took alarm and pressed for repayment the consequences were disastrous. Two large building companies—the Tiberina and the Esquilino—with nearly 40,000,000 lire of capital between them have been ruined, and other establishments, although maintaining their position, show by the altered value of their shares what colossal losses they are estimated to have met with. The fall in 1889 on the shares of the National Bank alone represents a sum of 60,000,000 lire; that on the shares of the Credit Mobilier over 30,000,000 lire; on the Società Immobiliare 25,000,000 lire, and so on. Owing to the general feeling of distrust, large withdrawals took place of the deposits lodged by the public with the banks, and the extra amount of capital thus seeking for employment accounts, to a great extent, for the comparatively high prices of "rente."

The course of gold and exchange in 1889 was favourable to the country; the highest rate of $1\frac{1}{2}$ per cent. having been only touched for a short time, while the average of the year was below 1 per cent.

Although the fall on bank stock severely affected Genoa, where the shares of the National Bank and Credit Mobilier are very largely held, no bankruptcy or disaster occurred, the losses having principally fallen on those who were able to meet them. Genoa continues to compare well with other cities of the Peninsular, and especially with Turin and Rome, for commercial steadiness and financial ease. The bank rate, which was lowered in March from $5\frac{1}{2}$ per cent. to 5 per cent., was raised in November to 6 per cent., but the rate of discount in the open market was always fully 1 per cent. less.

At present (March, 1890), "rente" is 2 per cent. lower than at

the end of last year, and bank shares show no recovery; but the acute period of the troubles of 1889 may now be said to be over, and a gradual return of confidence (provided, of course, no political complications arise) can be looked for. A dark point on the horizon, however, is the position of the budget. A deficit of 80,000,000 lire is anticipated for the financial year of 1889-90, which will still further swell the already huge figure of 460,000,000 lire of accumulated deficit to July 1889. An improvement in the commercial state of the country will, of course, to a certain extent, help future years, but the main fact is that Italy is now spending beyond her strength on her army and navy and forts, and without retrenchments the two ends can never meet.

VICE-CONSULATES.

Mr. Vice-Consul Ponzzone reports from Savona that the British *Savona*. vessels which arrived at that port in 1889 numbered 305, tonnage 327,684; against 320, tonnage 330,961, in 1888; and 358, tonnage 364,506, in 1887.

British shipping has, therefore, slightly fallen off, but the proportion taken by it in the whole trade of the port is even larger than ever; the total imports during the year having amounted to 681,000 tons, of which 547,000 tons were in British vessels.

The chief imports have been, as usual, coal from England, wheat from the Black Sea, and old iron from various places for the great local iron foundry; the exports have, as usual, been limited to chestnut staves and the common pottery now made in the district, and English shipping finds no outward cargo at all. Mr. Ponzzone says that some further facilities for discharging at Savona have been provided, and that it is not now uncommon to discharge cargoes of coal and pig-iron for Milan at that harbour in lieu of Genoa, even though the cost of railway transport is considerably in favour of the latter port.

The trade and industries of the district have passed through a severe monetary crisis in the latter part of the year, which caused the failure of two small firms in the coal trade, and also serious loss and difficulties to firms requiring large capital for their business.

Mr. Vice-Consul Congreve reports that no English vessel *San Remo*. visited the little harbour which exists, and that no improvement or work of any kind has been carried out towards improving the port.

The season was a good one in point of visitors, almost all the villas being let, and the hotels full. The English predominate; the number of Germans frequenting the place having decreased.

In commercial circles there has been an uncertainty and hesitation in embarking on any new speculation. Property has not depreciated, but neither has it advanced in value; the prices asked for land outside the town being about 15 fr. the square mètre, and in or very near the town 50 fr., and even more.

Several schemes are on foot for lighting the town by electricity, and one among the offers now being considered by the municipality is from an English firm.

A company is now engaged in putting up the telephone all over the town.

The export of lemons has increased from about 3,200,000 in 1888, to 5,000,000 in 1889; the export of palms has also increased; in other matters there is nothing particular to report, except that the town and neighbourhood are very healthy, and continue to merit the good reputation they have as an excellent winter station for our countrymen.

Spezia.

Shipping.
General
increase.

Mr. Vice-Consul Gurney reports as follows:—

The total amount of all shipping at the port of Spezia shows a considerable increase on that of 1888; and while the Italian shipping has risen from 1,331 vessels with a tonnage of 152,712, to 1,514 vessels with a tonnage of 193,289, the increase is principally due to the rapid extension of British shipping.

General
shipping.

The total entries of shipping at this harbour for 1889 were—sailing vessels 1,329, tonnage 66,210; and 306 steamers, tonnage 239,331; making a grand total of 1,635 vessels, and a tonnage of 305,541.

These figures, when compared with those of the preceding year, show an excess of 207 vessels, and 61,477 tons.

British
shipping.

From 33 vessels in 1887 with a total tonnage of 36,185 tons, and 77 vessels in 1888, tonnage 75,640, British shipping has again risen to 103 vessels, tonnage 108,642, entered during the year 1889.

Of these 103 vessels, all but one being steamers—64 brought 132,619 tons of coal and coke from Cardiff and Newcastle, mostly from the former port; three arrived laden with 2,810 tons of grain from south Russia, all clearing in ballast; two brought teak timber from India; one arrived from Holland with a 119-ton krupp gun, and the remainder with general cargoes of machinery and war material from England (all clearing with remainder of cargo) with the exception of two steamers entered in ballast to be dry docked.

Imports.

The total import for the district of Spezia, by land and sea, direct from foreign countries, amounted to a value of 13,870,163 lire; the custom duties on the import having realised the sum of 1,528,862 lire during 1888, and 1,915,190 lire during 1889.

The principal articles of import were as follows:—

Articles.	Quantity.	Value.
	Tons.	Lire.
Wine, spirits and oils	..	58,856
Colonials, drugs, &c.	..	38,340
Powder and explosives	260	348,295
Timber	11,771	809,329
Metallic mineral	1,682	544,850
Pig-iron	2,909	875,608
Steel and iron	2,311	513,962
Wrought iron and steel	441	198,527
Copper and bronze	85	229,966
Other metals	2,541	946,017
Machinery	1,831	2,140,300
Stone, &c.	2,214	100,400
Tiles and bricks	885	33,615
Coal	162,646	3,740,857
Wheat and oats	12,969	2,853,347
Other cereals	80	18,556
Animal produce	45	19,378
Miscellaneous goods	..	598,934

The exports are of little importance, comparatively.

Exports.

The total value of the exports by land and sea not exceeding 1,269,007 lire.

The duties paid on exports during 1889 amount to 41,672 lire, that is 3,584 lire less than for 1888.

The principal articles exported were as follows :—

Articles.		Quantity.	Value.
			Lire.
Wine, in casks	Litres ..	18,700	5,610
Olive oils	Kilos. ..	11,500	13,776
Metallic minerals	Tons ..	8,526	949,657
Copper .. ..	.. ..	20	44,750
Lead, silver and other metals .. ..	.. ..	371	180,091
Machinery .. ..	.. ..	4	4,200
Marble .. ..	.. ..	57	5,175
Stones for building .. ..	.. ..	428	32,062
Coal .. ..	.. ..	160	3,680
Animal produce .. ..	.. ..	46	5,245
Other goods .. ..	.. ..	..	74,534

Of the above-mentioned imports and exports the English *Pertusola* im-works of *Pertusola* come in for the following :—Imports—1,682 tons metallic minerals, 19 tons of old iron, 227 tons of pig-iron, 627 tons of steel and iron of all other kinds, 2 tons of copper and brass goods, 85 tons of machinery, 2,338 tons of lead, 125 tons of zinc, 346 tons of bricks and tiles, 18,085 tons of coal and coke, and 135 tons of other goods—making a total of 23,227 tons; paying a total customs duty of 71,285 lire.

The exports do not exceed 377 tons, and include 372 tons of lead.

Pertusola Lead and Iron Works.—The above figures give an idea of the activity of these works when compared with pre-ceeding years.

Industries.

					Tons.
Total import	1889	..	..	..	23,227
"	"	1888	..	..	19,917
"	"	1887	..	..	16,283

The firm is extending its shipbuilding works under the direction of an English and an Italian engineer.

Submarine Cable Manufactory of Messrs. Pirelli and Co.—These works have during 1889 been almost at a standstill after two years of great activity. But the firm is now negotiating a contract with the Italian Government for another cable it is contemplated laying in Italian waters.

The company's cable-laying steamer, "Citta di Milano," having in the meanwhile been employed by the Royal Navy as a transport for goods and war material carried from Spezia to the Island of La Maddalena.

Messrs. B. Baffico and Company's iron works and shipbuilding yard have been actively carrying out Government contracts for pontoons, a steam launch, movable steel crane, and cast-iron bronze-hooped shells of 28 centims. diameter, in addition to an iron sailing vessel of 500 tons displacement for a private firm and other private contracts.

Messrs. Larini, Nathan and Company's iron works are steadily extending their business in connection with the Italian Royal Navy and Royal Engineers. The Spezia branch of this Milanese engineering establishment is under the direct supervision of Mr. Nathan, the English partner of this firm of engineers, founders, and boilermakers. They are prepared to carry out all orders for dock-gates, pontoons, dredgers, boilers, bridge work, iron portable houses, and waterworks. The castings are made at the Milan works, where the firm has started a steel foundry on a small scale.

The work delivered during 1889 to the Navy includes four dock-gates, value 8,000*l.* a-piece; a dredger 41 metres long by eight wide, of 70 horse-power, for the Royal Dockyard; some bridges and two portable iron houses for the "Genio Militare," or Royal Engineers, set up on the Island of Palmaria; three portable iron signal stations, and other orders for private firms.

Agriculture.

Returns for 1889 tell a distressing story of the almost total failure of the wine crop, and a bad olive crop.

Wine has nearly doubled in price, and is of inferior quality.

In August last the vineyards presented a doleful sight, the leaves coloured red and falling off, bitten at the stem by the "Micete" bug, and the wine half destroyed by the ravages of the "Peronospora" parasite. The bunches of grape rotted away half ripened. The apathy and ignorance of the cultivator, proprietor, or peasant is remarkable. Through ignorance of the means of fighting this disease they do nothing to remedy the evil, and only deplore their misfortune.

The local authorities have been directed by the Minister of Agriculture to make known the results of researches and the remedies proposed by the Minister.

One hundred and fifty grammes of sulphate of copper in 100 litres of warm water solution for spraying before the vine

blossoms, increased in strength to 200 grammes for watering immediately after flowering.

The bad oil crop has resulted in raising the price of best oil to 1.80 lire to 2 lire the kilo. from 1.45 lire, the maximum price during 1888.

The lemons and oranges promise a good crop.

The opening of the Borgotaro section of the Spezia-Parma Public works. Railway line, though announced for 1892, will scarcely take place before 1894.

The delay has been due to the decision of the Government to have the tunnel widened to permit of a double line being laid. This double line will extend through the Borgallo tunnel of 8 kiloms., and to a distance of 10 kiloms. beyond at either end. The portion of the tunnel already pierced will be enlarged to one side, part of the masonry roofing being retained.

The brittle nature of the rock in some places has added to the difficulties encountered, making a masonry arching unavoidable.

The delay can be attributed to yet another cause. At the point now reached from the Pontremoli side a large source of water has been met in the centre of the line, necessitating the boring to a large width to tap the source, which has caused an additional piece of engineering work to that contemplated. A canal has been dug out between the rails up to the southern entrance to carry off the water; the water power gained has, in compensation, been adapted to the works in progress.

The commercial harbour is still a thing of the future, through want of funds and divergence of views. The present arrangements for discharging outside of the dockyard are wholly inadequate, and the stoppages of work by weather and public "festas," in addition, are a source of constant complaints on the part of masters of British colliers.

The unavoidable delay in the completion of the Spezia-Parma line, from which so much is expected, has apparently found an echo in the settlement of the Commercial Harbour question.

Whatever increased activity may arise in consequence of the opening of South Lombardy and Emilia to direct communication with the Gulf of Spezia, its prime importance will still be due to the activity of the Army and Navy administrations and the extension of iron works connected with them.

Another source of prosperity from which much is hoped in many quarters is that, consequent on the renewed annual influx of visitors and winter residents, the false impression of unhealthiness caused by the cholera outbreaks of a few years ago is gradually becoming dispelled, and the mild climate and infinite variety and beauty of scenery of the district is becoming better known.

The cholera outbreaks were solely due to the fact that the Sanitary. Bay of Varignano was chosen as the Italian west coast quarantine station, which will no longer be the case in the future and the report of unsatisfactory drainage in the old town (which the newly-elected municipal authorities are earnestly bent on grappling with), common to every old town in the south, built in days when

hygienic principles were unknown, do not affect the districts and many surrounding hill sites patronised by the foreign colony.

RETURN of all Shipping at the Port of Genoa in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	40	8,977	986	1,147,340	1,026	1,156,217
Italian	3,218	286,430	1,468	1,201,956	4,686	1,487,386
French	2	794	203	191,694	205	192,488
German	2	637	109	189,053	111	189,690
Others	86	23,795	256	282,272	342	306,067
Total	3,348	319,533	3,022	3,012,315	6,370	3,331,848
" for the year preceding...	...	...	...	...	5,892	2,993,562

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	85	6,528	984	1,070,232	1,019	1,076,750
Italian	3,118	278,736	1,434	1,164,960	4,552	1,443,696
French	2	794	201	191,231	203	192,025
German	2	637	111	186,892	113	187,529
Others	110	27,392	266	291,108	376	318,500
Total	3,267	314,087	2,996	2,904,413	6,263	8,218,500
" for the year preceding...	...	...	...	...	5,787	3,009,879

RETURN of Principal Articles of Export from Genoa during the Years 1889-88.

Articles.		1889		1888.	
		Quantity.	Value.	Quantity.	Value.
Wine... ..	{ Gallons...	2,672,802	194,385	1,598,080	116,224
	{ Bottles ...	2,501,706	300,204	2,318,100	278,172
Olive oil	Tons ...	9,297	371,900	4,455	178,216
Silk thread and tram ...	Lbs. ...	125,011	150,621	232,577	285,050
" manufactures of ...	" ...	132,409	160,704	56,394	102,918
Paper	Tons ...	3,550	254,028	2,142	191,612
Marble	" ...	3,155	48,927	2,660	45,488
Rice	" ...	23,611	223,884	14,313	166,332
Coral... ..	Lbs. ...	56,491	52,615	49,605	58,544
All other articles	...	...	2,877,307	...	2,501,125
Total... ..	...	...	4,669,575	...	3,923,681

N.B.—In these tables the *l.* sterling is reckoned at 25 lire, the ton at 1,000 kilos., the kilogramme at 2·20 lbs., and the hectolitre at 22 gallons.

RETURN of Principal Articles of Import to Genoa during the
Years 1889-88.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coffee	6,464	517,131	6,993	419,604
Sugar	42,718	512,612	34,133	409,600
Cotton, raw	67,163	4,029,757	46,479	2,789,186
„ manufactures of ..	..	478,706	..	325,724
Wool, raw	4,164	666,351	3,114	540,235
„ manufactures of ..	..	146,582	..	155,584
Hides	8,293	663,415	5,111	409,024
Old iron	51,009	204,036	68,890	275,560
Pig-iron	12,922	103,373	14,551	116,629
Cast-iron, manufactures of	1,362	10,897	2,473	19,777
Wrought iron	18,837	226,038	18,489	221,750
Machinery	..	488,642	..	468,178
Coal	1,356,990	1,628,388	1,325,600	1,590,718
Wheat	300,652	3,607,426	225,961	2,711,132
Rice	41,952	268,092	35,736	214,417
Cod and other salt fish	14,790	591,607	11,413	228,278
All other articles ..	..	6,133,412	..	4,880,962
Total	..	20,276,465	..	15,776,308

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ITALY.

LEGHORN.

Consul O'Neill to the Marquis of Salisbury.

My Lord,

Leghorn, March 29, 1890.

I HAVE the honour to enclose a Report upon the Trade of this district for 1886, 1887, 1888 and a portion of 1889.

As this Report covers a period of four years, no Report upon the Commerce of this district having been sent in since 1887 (which only dealt with the trade of 1885), I have been led to generalise, perhaps, more than I should have done had it embraced only the past year.

It does not include a Report from the district of Elba. Mr. Vice-Consul Fossi writes, I regret to say, that he has been so indisposed by a severe and lengthened attack of influenza as to be unable to frame a Report upon his district.

I have, &c.

(Signed) HENRY E. O'NEILL.

Report on the Trade of Leghorn.

A noteworthy feature in the progress of commerce in Italy since the unification of the Kingdom, the development of railway communication throughout the Peninsula, and the great deviations in old international highways—due to the cutting of the Suez Canal and the construction of the Mont Cenis and St. Gothard tunnels—is the unequal advance made by the great Italian ports: the rapid and immense advance of some, and the stationary condition, almost indeed decline, of others.

Leghorn affords an illustration of this, and it is impossible, when speaking of it, not to allude to these large and initial elements of change, for though they came into existence some time back, they are in present and ever-increasing action, and no examination of the present condition of trade in West Tuscany and its chief port of Leghorn, or attempt to explain its stationary condition with

relation to the great neighbouring ports of Genoa and Naples, would be comprehensive or satisfactory that neglected to take into account forces which, after all, have more than any others contributed towards the decline of general commerce in this district.

The loss of its privileges as a free port does not sufficiently account for its want of progress.

Some of the true causes.

It is not situated upon a main line of railway.

Has lost ground in railway competition.

Sea freights from Genoa against it.

Naples and Genoa both combine to depress it.

For Genoa is the terminal point of a sea highway from the East.

The loss of the privileges Leghorn formerly enjoyed as a free port is too often quoted as cause sufficient to account for its relative decline. But that loss only placed Leghorn on an equal footing, in respect to those privileges, with the neighbouring great ports. Can it, in reason, be held accountable for the fact that Florence and East Tuscany now partially supply themselves, in so far as regards many foreign commodities, from the port of Genoa—that, in short, Leghorn has lost the place it occupied only 20 years ago as the base of distribution for all Tuscany and even the Roman Provinces? Assuredly not. The divergence of commerce from its old and natural route through Leghorn is due to the fact, that in the general advance of railway construction Leghorn was, so to speak, thrown out of line. The main lines from Genoa to Florence and to Rome passing through Pisa instead of through Leghorn as was first proposed. Leghorn thus was left at the end of a fragmentary branch, which connects it with the great main line at Pisa, and the drawbacks incidental to that connection have now to be suffered by passengers and goods going hence to the inland centres.

When to this we add that a successful war of rates was for many years carried on by the Genoa-Pisa-Florence Railway with that from Leghorn to Florence, the former actually outbidding the latter, although the relative distances run were 267 kilometres against 97 kilometres, we find, I think, one of the main causes of the loss of place Leghorn has sustained in relation to the interior trade.*

Sea freights may also be said in a measure to favour Genoa against Leghorn, for in respect to most goods the freight is slightly less to that port, and Genoa being almost invariably the first called at by ships from the West, time may often be gained by the debarkation of goods there and their despatch by rail to the interior markets.

Again, as a port of call upon a great highway from the East, Leghorn takes, and here, I think, naturally, a secondary place. She is overshadowed by her two great neighbours, and somewhat crippled, too, by the comparative inferiority of her port.

Naples, with its larger population and finer natural harbour, and Genoa, with its advantages as a point of debarkation from the East for continental and trans-continental traffic, combine to throw the intermediate port of Leghorn into the shade, and to cause its rejection as a regular port of call for the steam liners from the East. Genoa must be favoured, for she requires all the advantages that can be given to her, in point of time and quick

* This war of rates lasted until the purchase by Government, in 1882, of the so-called "Roman Railways," when the rates were rearranged upon a more equal footing, but the damage to Livornese trade was by that time done.

despatch, to enable her to compete with her great French rival, Marseilles, for the trans-continental trade.

I do not, however, desire to draw too sombre a picture of the condition of trade in this district. Indeed, the statistics that I have to show will prove that if Leghorn has lost the leading place it once held amongst Italian ports, its trade is, at least, not on every side a declining one. The character of the trade is changing, but if old lines are being obliterated, new channels of trade are forming. If we have lost our place as an emporium of Mediterranean commerce, new industries are forming around about us, which promise, in some measure at least, to compensate for old losses.

But the trade of Leghorn is not wholly a declining one.

Its character is changing, and new channels of trade are forming.

It will, no doubt, occur to most that many other causes beyond those I have named, have contributed to bring about the great changes above referred to. It may be said that I have not even mentioned the main influences that have affected the course and extent of Italian trade within the past 20 years. For example, I have said nothing of the agricultural distress, a cause that has been increasing in intensity for more than 10 years; of the rapid development, at almost fever pace, of railway communication; of speculative building in the great centres; of the enormous growth of the expenditure upon the military and naval forces, and consequent import of war material of all kinds from abroad; of the influence upon both imports and exports of the successive large issues of paper-money in creating at first an appearance of high prices for commodities, and afterwards increasing the difficulty of paying for them, by the resulting premium upon gold; of the measure whose effect is most recent and most clearly visible of all—viz., the war of Tariffs with France; or, lastly, of that influence stronger to divert the natural course of trade than any—the influence of the protective fiscal policy in which Italy has now fairly embarked.

Many causes have combined to produce the changes stated above.

The chief of these causes.

If, in speaking of the causes that have affected the commerce of Leghorn alone, I have mentioned none of these forces, it is because none of them have influenced this district in any special or singular degree. They are influences that have stimulated or weighed upon all Italian cities alike. And my object was only to point out those special causes that have contributed to handicap Leghorn and retard its progress in the general advance made by Italian commerce since the unification of the kingdom.

But these causes have not influenced Leghorn alone.

Table A will assist to prove the truth of what I say regarding the unsatisfactory condition of trade at this port of late years. It covers the past 15 years, and shows, as far as a table of values can show, that the import trade has slightly but distinctly declined, but that the exports have fallen at an almost startling pace, the disproportion between the two increasing year by year, until in the last triennial period—1886-88 inclusive—they amounted to only 52 per cent. of the imports.

Table A shows that trade has declined.

Exceptional causes have operated on trade in the past three years.

This is a serious decline, and its causes merit careful examination. But before any general conclusions can be drawn from it, it is necessary to remember that exceptional, and it is to be hoped

Tables B
and C.

Their chief
features, a
great variation
in total of
trade and
remarkable
fall in exports.

The causes of
these unusual
changes.

The new tariff.

The commer-
cial war with
France.

Tables D
and E.

What con-
clusions are to
be gathered
from a general
survey of the
condition of
trade.

The evidence
afforded of the
effect of
protection.

Import duties
in 1889
averaged 19
per cent. of
total value of
imports.

temporary, causes have operated to an extraordinary degree upon both imports and exports during the past three years. Those special causes will be clearly seen by an examination of tables B and C, which show the sum total of all imports and exports for 1886, 1887, and 1888, classified under 16 categories according to the nomenclature adopted in the Italian customs returns.

A glance at these tables brings instantly into view two prominent points. First, the erratic course trade has taken during the past three years, and, secondly, the sudden fall in the export trade, and the extremely low ebb—far lower than at any time within the past half century—which exports from this district have reached.

In 1887 there is an increase in imports of about 280,000*l.*, but in 1888 imports have fallen from 3,391,804*l.* to 2,335,484*l.*, a sudden decline of nearly one-third, and in the latter year we find exports have tumbled to the unprecedentedly low figure of 1,109,724*l.*

The remarkable variation, or derangement, here manifested in the course of trade during the past three years is due almost wholly to two causes. The first—in point of time at least, and most directly affecting imports—being the impending changes in the Italian customs tariff, known to be in the direction of heavier duties, which led importers to largely increase their stocks before the application of the new tariff on March 1, 1888; the second being the denunciation of the Franco-Italian Treaty, which drove off, in the same year, the best customer Tuscany had for the products which form the larger portion of her exports. The unusual depression, evidenced by the returns for 1888, may, therefore, only be regarded as temporary, being chiefly due to the unnatural inflation of the previous year.

Tables D and E, giving returns of the principal articles of export and import, will give a further and more detailed view of the course of trade within the same period. With some difficulty I have obtained, and show in parallel columns, the proportion of each of those articles received from and sent to the United Kingdom.

Before, however, touching upon any of the items separately which constitute British trade with this port, I may be allowed to summarise and to point to some of the most important of the conclusions to be gathered by a general survey of the condition of commerce in this district.

In framing import and export tables, it is impossible, in the first place, not to watch for the evidence they should afford of the influence of a protective policy both upon the foreign trade of the country and upon its internal development. No one can doubt, I think, that Italy is now fairly committed to a policy of protection to native industries.

The fiscal barrier has been slowly building, but has at last attained dimensions which make it at many points quite impassable. If we take the total value of all imports into Italy in 1889, and place it side by side with the total of duties levied upon them, we shall find that upon every single franc's worth of

commodities imported a duty of 19 cents. was paid. In other words, the customs duties levied upon imports averaged 19 per cent. of their total value. Upon many articles of prime necessity the proportion is far greater. For example, upon every franc's worth of coffee imported 60 cents. was paid; for the same value of wheat, 25 cents.; whilst refined sugar paid a duty of 180 per cent. upon its value, or a duty of 90 fr. upon a value of 50 fr. The last tariff shows that all along the line the frontier barrier has been raised, the distressed state of the treasury combining with the interests of "national industry" to render the Government only too ready to impose heavier duties wherever protection seemed desirable, or an increase of revenue possible.

The tariff barrier has been everywhere raised.

The effects of this policy are clearly visible in a variety of ways, and they may be seen in this district just as distinctly as in any other portion of the kingdom. We may see them, upon examining our import tables, in the decline or want of expansion in the returns of articles of foreign manufacture, and in the establishment and growth of industries ill adapted to Italian soil, that is to say, for which both raw products and food, of motive power, have to be imported from abroad—for the purpose of the manufacture of articles shut out by prohibitive duties. I do not say too much when I assert that without that protection not a single one of the new manufacturing industries launched in this district within the past 10 years would survive a day. The cotton-jute and linen spinning and weaving mills of the districts of Lucca and Pisa, the metal rolling mills of Leghorn, as well as other minor industries I could name, owe their birth to protection, and are sustained by it. We see its effects also in the increased imports of raw material, of cotton, jute and flax, of hides, of iron, old, scrap and pig, and of coal and coke, to provide the motive power for these manufactories.

The noticeable results of protection.

Decreased imports of foreign manufactures.

Establishment of home industries.

Increased import of raw material.

Of raw cotton Italy imported, in 1888, 74,978 tons, and the next year this import had increased to 89,843 tons; of wool, cleaned and uncleaned, 9,379 tons in 1888, and 9,759 tons in 1889; and of hides, 13,375 tons in the first of these years, and 16,288 tons in the last.

Statistics showing the above. A steady increase in imports of raw cotton, wool, hides, iron, coal, and coke.

In the import of pig and other forms of crude iron we notice a remarkable increase from 89,563 tons in 1888 to 168,677 tons in 1889, and though the returns of coal and coke show an increase of only 126,000 tons in a total of just under 4,000,000 tons, it is evident that this is partly due to the higher prices that ruled last year, for the difference in the declared values is very large, the import being valued at 3,563,002*l.* in 1888, and 4,319,004*l.* in 1889.

On the other hand, the decline, or want of expansion in the import of textiles and manufactures of all kinds, is very clearly apparent. Italy imported in 1885 7,682 tons of cotton yarns, and valued at 852,320*l.*; but, in 1889, the import of this article was reduced to 3,667 tons, of the value of 442,525*l.* And of cotton tissues, the quantity imported in 1885 was 12,635 tons, the value of which was declared to be 2,008,320*l.*, but this import also

And decrease in import of textile fabrics, and iron and steel manufacture

steadily declined in successive years until last year it had fallen to 8,772 tons, the value of which is given as 1,420,700*l*.

Woollen yarns show a very slight increase from 976 tons in 1888 to 1,001 tons in 1889, and woollen tissues rise slightly also from 3,736 tons to 4,194 tons in the same two years. But linen and hemp tissues fall in the same period from 615 tons to 540 tons, whilst in the import of iron manufactures no progress whatever is visible, the import being 203,207 tons in 1888, and the same to within 20 tons in 1889. Further figures can hardly be wanted to show the new courses trade and manufactures are taking in the Italian Kingdom. They also go far towards proving that the Italian market is gradually, but surely, closing to British manufactures.

A noteworthy result of protection is the entry of foreigners from every side to share in the profits created by it.

Again, the results are to be seen—and this is one of the most remarkable of them—in the entry on all sides of foreign capital and enterprise to take advantage of the very system framed to shut out their competition, and in the production, with very profitable results, within the field so fenced in of what it is almost profitless to produce without it.

For whatever may be said of the advantages of establishing national industries by the aid of foreign capital and under foreign guidance, it cannot be denied that a very large portion of the profits are carried out of the country, though only, of course, in just return for the advantages thus given. There is not, I think, a more remarkable feature in the recent economical development of Italy, and of the efforts made “to emancipate her from dependence upon foreign industries,” than the readiness shown by foreign enterprise and capital to take advantage of the circumscribed and profitable market that a system of protective duties always creates.

This is to be seen in case of iron manufactures and shipbuilding.

Heavy duties upon all iron and steel manufactures and upon machinery, added to bounties upon the construction of ships, combine to render shipbuilding profitable in all its parts within the confines of the kingdom,* and accordingly we find some of the largest iron manufacturers and shipbuilders of Italy in alliance, upon Italian soil, with British firms for the construction of machinery and ships. This is to be seen in cases too well known for repetition, at Genoa, at Naples, and at other places, and the largest and most important manufacturing industry of Leghorn, the metal works and rolling mills, was established mainly with French capital, and, whilst under an Italian name, is under French control and direction. The largest jute mills of Lucca are owned and directed by Germans, and owe their existence to German enterprise and capital. Plans are now maturing for the establishment of large glass works at Pisa, in which one of the

The French metal works at Leghorn. The German jute mills of Lucca.

A French company about to establish glass works at Pisa.

* In the last budget the sum of 165,120*l*. is inscribed as having been paid in bounties to the Italian mercantile marine, under the Law of December 6, 1885, and the Royal Decree extending the same of March 22, 1888. And the tone of the press is generally congratulatory in recording the fact that in “Italian dockyards” there has been a notable increase in construction, as during the period in which those bounties were granted, “about 10,000 tons of ships in steel, and as much again in wood have been laid down.”

first firms engaged in this industry in France will make for the Italian protected market the glass they no longer find it profitable to import. I quote but a few cases, and confine myself as far as possible to those connected with this consular district, but they are to be met with in nearly every great branch of manufacture, and throughout the length and breadth of the Peninsula.

This disposition to share, wherever practicable, in the profits afforded by protection is, naturally enough, not confined to the field of manufactures, though there it shows itself most markedly, and takes its first development. It will seize when opportunity presents itself upon the sources of raw material also.

For instance, Italy possesses, so far as is at present known, only one source, of any importance whatever, of production of iron ore, and that is the island of Elba. Now, upon the import of foreign pig iron a duty of 10 fr. per ton is levied.

A group of foreign and home capitalists propose to take over the whole of the Elba mines, and provided they can feel reasonably assured of the continuance of the present import duty, are ready to set up blast furnaces for the production of Italian pig, feeling confident of a ready and profitable market in the demands of the rising iron industries of Italy, which are able now to bear a heavy duty upon their raw material and yet to live. At the present moment Elba ore exported abroad pays a royalty to Government of 3 fr. 50 cents. per ton, whilst upon the very small quantity sent over to Italy only 50 cents. is paid, and, as I said before, upon the import of foreign pig 10 fr. a ton is levied. It is now a nice question whether the Government can afford to resign these two sources of revenue in order to further gratify the desire to "emancipate" Italy from dependence upon foreigners for the raw material of her iron industries.

Last year more than 325,000 tons of pig, scrap, and old iron was imported into this kingdom, and over 100,000 tons of Elba ore was exported thence. Both formed a considerable source of revenue which would practically disappear if Italy be compelled to look to home sources for the materials of her iron industries,*

* Within the past week, and since the above was written, the "projet de loi," determining the conditions under which it is proposed by the Government to concede the mines of Elba and of the small adjacent island of Giglio at the expiration of the present lease on the 30th of June next, has been placed in the hands of the members of the Italian Parliament. I quote the chief provisions which show clearly the protectionist spirit in which it is framed.

1. The concession will only be granted for 20 years unless the concessionaires undertake to set up blast furnaces in Italy, in a locality to be selected in agreement with the Government, capable of smelting not less than 180,000 tons of ore annually. If the concessionaires bind themselves to have these furnaces erected, and working within two years from the date of contract, the concession may be extended to 25 years.

2. The concessionaires are prohibited to export from the islands of Elba and Giglio more than 180,000 tons of ore annually, but if a greater quantity be required for Italian industries the turn out may be carried up to 200,000 tons.

3. The concessionaires will be required to furnish the mineral to Italian industries at a price not superior to that fixed upon in the contract with the Government.

4. The concessionaires are prohibited from establishing in Italy any works in iron or steel for the rolling of armour plates, the making of rails, &c.

The tendency to take advantage, wherever possible, of the profits of protection will extend to sources of raw material also.

Italy possesses but one source of production of iron ore—Elba.

It is proposed to take over that.

If done, Government resigns two sources of revenue.

and the rising iron industries of Italy will suffer their first blow from protection, for the conflict—which all Protectionist countries exhibit to us—between the manufacturing interests and those of the producers of raw material will have commenced.

Some effects of protection upon agriculture. Upon the supply and protection of wheat.

The duty on foreign wheat is increased.

Its results.

India ceases to supply Italy, but Russia continues to do so.

The import of foreign wheat declines, but only temporarily.

The consumption of inferior grain increases.

But no increase is visible in national production.

As a protective measure the increased duty seems in-operative.

The case of sugar.

Its consumption declines under the heavy duty.

And sugared fruit industries do not expand as they might.

The case of heavy duty upon coffee.

Again, it is very interesting to trace the effects of the protective system of Italy upon the agriculture and the food supply of the people. Take first the case of wheat. India and Russia were competing, up to last year, to supply Italy with cheap wheat, and so much cheaper and better was their production than that of Italian farmers that the import steadily increased from 147,358 tons in 1881 to 1,015,860 tons in 1887. The cultivation of wheat was rendered less profitable, it is true, but the wine and fruit production was greatly extended. In February, 1888, the duty on imported wheat was raised from 30 fr. to 50 fr. per ton. What is the result? The competition between India and Russia to supply Italy with good wheat ceases, for Indian wheat, saddled with the heavier sea freight and Suez Canal charges, cannot stand the additional burden imposed upon it by the new duty. Accordingly we see the import of foreign wheat fall in 1888 from over 1,000,000 to 669,789 tons, but the consumption of inferior grains, such as maize, increases enormously, for Italy, it is estimated, requires not less than 4,000,000 tons of grain annually for the sustenance of its people. And the returns show that the value of maize imported, the year after the imposition of the new duty, is 22,000,000 fr. greater than in the previous year. At the same time there is no visible increase in the national production. The grain harvest of Italy in 1889 is officially declared to be 36,592,900 hectolitres, or a shade less than that of the previous year, which was 36,739,200 hectolitres.

Nor apparently is the new duty able to shut out foreign competition, for in 1889 the import of foreign wheat, now nearly all Russian, increases again to 872,743 tons. The increased duty as a protective measure would appear then to have failed. But it has not failed to lessen the sources of supply, and it has compelled the poor of the country to eat inferior and less nutritious grains, and the rich to pay more for their wheaten loaf.

Take next the case of sugar, upon which, for the protection of the sugar refiners of Italy, an almost prohibitive duty is imposed of 3*l.* 12*s.* per 220 lbs.*

Of late years England has experienced to the full the beneficial effects of a bountiful supply of cheap and good sugar. Its import has been steadily increasing, and all those industries that depend greatly upon a cheap supply of this product have extended in every direction. But in Italy the consumption of sugar during the past six years grows steadily less, and the import of saccharine steadily greater, and all its candied and sugared fruit industries, which might be more largely developed, and serve, from the perfection of its fruit production, to alleviate agricultural distress, languish from the effects of an unburdened foreign competition.

I will take one more case, that of coffee—an article of especial necessity to Italians as to most southern nations, but which they can-

* 90 lire per quintal.

not afford to drink pure, because of the heavy duty of 5*l.* 11*s.* per 220 lbs.* with which it is burdened, for purposes, I need hardly add, purely revenueal. We see that during the imposition of this duty the import of coffee has steadily declined, whilst that of its adulterate chicory has steadily increased in an unpleasant proportion. In 1885 Italy imported 23,596 tons of coffee, in 1889 that import had fallen to 13,528 tons; but during the same period the import of chicory had increased ten-fold, being 242 tons in the first of these years, and 2,833 tons in the last.

Its import declines.

That of chicory increases enormously.

It is impossible within the limits of a trade report to extend this enquiry as it deserves, but I think I may say that an examination of Italian statistics only strengthens the conviction that in these days when whole continents compete to supply Europe with food, the successful "protection" of agriculture becomes more and more difficult, and its effects more than ever harmful. It is, also, perhaps more difficult to induce capital to flow into agricultural than into manufacturing channels.

Whether Protection be necessary and ultimately advantageous for the establishment of manufacturing industries may be a question still open to dispute. It may be that the advantages of what may be called "national production at any cost," are so manifold and great as to outweigh all that can be said against it, and the recognised disadvantages are too many to be enumerated here. But there need be no concealment of the object of the entry of foreign capital and skill and enterprise to assist in this production. Germans, French, Austrians, Swiss, and English alike, do not set up manufactories in Italy with any disinterested view of developing Italian industries. They all come to share the profits created by the protective system Italy has chosen to adopt. And out of whose pockets are these profits ultimately paid? One cannot refrain from asking—does this side of the question sufficiently enter into the calculations of Protectionists?

Not long ago an able writer, speaking of the protective system of Portugal, expressed his belief that it brought about a more equitable, and therefore better, distribution between class and class of the profits of industry. At the same time he admitted that the aggregation of national wealth was impeded and retarded by protection. And the view he then expressed gained some currency in the public press. Such a view as this of protection cannot surely have taken into account the growth of those two most powerful foes of a just distribution—the modern "trust" and "corner"—both of which find a soil peculiarly congenial to their growth in the fields limited and circumscribed by protection.

A new view of protection.

That did not take into account the combination called a "trust."

Their operation has been so severely felt in the protected market of the United States, and is so well described in the report of a Senate Committee upon them, that I must take the liberty to quote.

The growth of which is aided by Protection.

"The main purpose, management and effect of all these 'trusts' upon the public is the same, to wit, the aggregation of capital and the power of controlling the manufacture and output of various necessary commodities, the acquisition and destruction of competitive properties—all leading to the final and conclusive

The effects of "trusts" in the United States.

* 140 lire per quintal.

"purposes of annihilating competition and enabling the combination to fix the price at which they would sell the completed product to the consumer. In any event, the public at each end of the industry, the producer and the consumer, is, and is intended to be, in a certain sense, at the mercy of the syndicate, combination or trust."

The money market and foreign exchange of Italy in 1889.

From causes affecting the balance of trade, it is natural to turn first to one of its most direct and important results—the foreign exchanges. There have been no great fluctuations in the foreign exchanges throughout the past year. The average rates at which sight bills upon London have been purchasable throughout the year has been 25·44½ lire, whilst the highest point touched at was 25·83 lire on September 13-14 last, and the lowest was 25·27 lire on June 7 last.

A steady rise in the exchange and fall in Italian securities lately visible.

But in the last few months of 1889, and since the beginning of the current year, there has been a steady rise in the exchange value of bills on foreign capitals, together with a gradual fall in the price of Italian "rente," and of the other best securities the country has to give, that can only be read as betokening a growing uneasiness abroad and at home in the solidity of the base of Italian credit. It is, however, probable that this is only a passing cloud of distrust which may disperse shortly, provided the political horizon remains clear, and the true explanation of its appearance probably is, that speculation had somewhat artificially raised the prices of even the best Italian securities, and that a slight reaction was but inevitable before they recovered a more normal value.

Can any early recovery be expected in the price of gold and exchange?

Italian paper is practically inconvertible.

The present premium on gold.

With the exchange and price of gold, however, it is difficult to see how any such recovery is to be expected. Not only does the balance of trade, as judged by the import and export statistics, continue to be strongly against the country, but also the Italian paper currency is now practically inconvertible, for whatever may be printed upon the face of the notes issued, it is impossible to exchange them for gold, and even silver can only be obtained in small quantities. If gold be wanted for the discharge of liabilities incurred abroad, it may be purchased with "biglietti di Stato," or State guaranteed paper; but a premium of 2·2 per cent., which therefore represents the depreciation of these notes, must at this moment be paid for it.

Again, it must be remembered that the law of the 30th of April, 1874, which limited the paper issue of the six authorised Banks of Emission to 754,208,707 lire, and regulated the metallic reserve, has on several occasions been strained, and extraordinary issues of paper have been made without any corresponding increase in the reserve of gold. All which points to a probable further depreciation of the Italian paper currency, and a continued rise in the premium upon gold and price of foreign gold bills.

True that import and export returns often afford an incomplete idea of the liabilities and assets of a country.

It may be said that the import and export returns afford but an incomplete and only partially reliable index of the liabilities and assets of a country. This is, of course, true in certain cases. If Italy were a large freight-earning country, or if loanable capital had been so long abundant in the country as to have led to extensive investments abroad of the national savings, the objection would hold good in her case. But no such forces operate to any

very appreciable extent in the case of Italy to neutralise the evil effects of a large and repeated excess of imports over exports in the trade balance of the country, and there seems to me foundation for the surprise expressed that the Italian lire has not shown a greater depreciation before.

There is, however, one influence acting always favourably upon the foreign exchanges of Italy to which one rarely sees allusion made—possibly because its strength is difficult to estimate—although there can be no doubt that it acts with considerable effect. That force, or influence, is the value of the cheques and bills drawn upon foreign countries, and money spent in Italy by the enormous floating foreign population that resides for many months in the year within her borders.

Italy's sunny winter climate, art treasures, and historic associations attract to her large numbers of the rich and leisured classes from all the cultured countries of the globe. Every autumn sees these foreign streams pouring in, over the Alps and by the sea, and the whole winter through they remain shedding, so to speak, a shower of gold upon the land.

I need not remind any reader of this report that every 100*l.* or 100 dol. drawn by one of these foreign visitors upon his banker abroad acts in precisely the same manner upon the foreign exchange as 100*l.* or 100 dol. worth of commodities exported by Italy to a foreign country would do; that is to say, it assists to neutralise the effects of an excess of imports over exports, and to preserve for Italy a favourable exchange.

It is very difficult to estimate the amounts thus spent, but assuming the number visiting Italy annually to be even only 200,000—Rome alone takes nearly 50,000—and supposing each of these to spend but 100*l.* in the country—many spend their thousands—we have a total of 20,000,000*l.* of foreign gold annually credited to Italy in this manner, assisting to develop her resources and improve her credit, with no further active effort on her part than is afforded by a genial host to a well-paying, and, therefore, not unwelcome guest.

Though I am unable yet to give the returns of imports and exports of this port for 1889, as they are not issued by the Chamber of Commerce until July next, I am able, through the kindness of friends, to furnish the following information up to date regarding a few of the chief articles of British trade with this port.

Codfish.—The importations show again a slightly diminished proportion of Labrador and Newfoundland cured, due partly to the smaller take of last season, but primarily to the heavy subsidy upon the French fish, together with the improving quality of the French cure (“Lavé”), which makes the competition of the British curers increasingly difficult.

In addition to the competition of the subsidised French cure we have now to contend against Norwegian and Iceland codfish, both of which have entered the Tuscan market of late years, and though a few years ago the Norwegian cure was in general disfavour, and the Iceland cure has as yet only been imported by Genoa dealers, it is plain that a severer competition than ever

But Italy is no large freight earner.

Nor will the interest of her capital invested abroad be sufficient to restore the balance between imports and exports.

One influence, rarely alluded to, that acts strongly in favour of the foreign exchange of Italy.

The large total of bills and cheques drawn on foreign bankers by foreign visitors in Italy.

An approximate estimate of this amount.

The delay in the publication of the statistics of the commerce of Leghorn.

Some information furnished by friends.

Codfish.

threatens for British dealers in a market that 10 years ago we had no difficulty in holding as our own. The Norwegian cure has already forged ahead, and it is estimated that the amount sold equals, if not exceeds, the British cure.

Arrivals.

The first arrivals of Labrador this season were sent by steamer, and, upon September 16 last, 311 tons of Labrador and 146·5 tons of "shore" cure reached Leghorn.

These were soon followed by the cargoes sent in sailing vessels, nine in number, which landed here 2,909 tons of Labrador and 712·6 of "shore" cure, making a total of 4,079·4 tons of Labrador and Newfoundland cures.

Prices.

Prices during the season commenced, say, from 18s. down to 13s. for Labrador (with the exception of the arrivals by steamer, which fetched 22s.), and 24s. and 23s. for the "shore" cure. Fortunately, the quantity altogether was small, and it would have been impossible to have got through more, as the influenza epidemic almost entirely put a stop to the consumption of all cured fish, and even now, when the epidemic has disappeared from most places, the demand is nothing to what it generally is at this time of the year.

The French cures and the subsidy upon them.

The French cure is apparently inexhaustible—their shipments commence in June and continue regularly up to the early part of May. The quality improves every year, and there can be little doubt that it will eventually drive the Newfoundlanders out of the Italian market, as they cannot compete with the bounty of 16 fr. for every 100 kilos. of French fish landed at Leghorn.

The prices obtained for the "lavé" cure has ruled during the season from 65 fr. down to 40 fr. per 100 kilos., delivered at any of the Italian ports, and the quantity landed at Leghorn reached 4,252·5 tons, or 158 tons more than the British cures.

Pilchards.

Pilchards.—After some little discussion among the savants (Dr. Günther, of the British Museum, and a number of professors at various Italian Universities, were called upon for their opinions), the question of the identity of the "Cornish pilchard" and the "Spanish sardine" has been finally set at rest, and the Italian Government has relinquished the duty—about 12 lire per hoghead—on the Cornish cured pilchard, as it had previously resigned the tax upon the Spanish sardine.

This fishing has, however, proved most unremunerative during the last season as regards prices realised by shippers, though the quantity secured has been about the average. The chief cause again has been the influenza epidemic, which has influenced most people to alter their diet, more especially as the Pope has revoked all Lent restrictions. I may add that 5,098 casks (half hogsheads) of this fish has been landed at this port by steamers from Penzance, Liverpool, and Plymouth, and unless some demand soon springs up for the article, importers tell me that it is probable a great part will have to be reshipped to Cornwall, as the heavy duty on salt of 2l. 8s. per 220 lbs. makes their preservation here a costly matter.

Herrings.

Herrings.—44,616 barrels of these fish—all Yarmouth cured—

have reached Leghorn during the season by steamer from Liverpool and London. The highest price obtained has not exceeded 17s. 7d. per barrel, which, when landing charges and agent's commission, municipal dues, &c., are deducted, will leave about 13s. for cost of fish, freight, and insurance. The average prices, however, have been much lower, and they are now down to 7s. 2d. and even 5s. 7½d. per barrel, at which rates several thousand barrels have been taken on speculation for Southern Italy. These last prices simply mean a dead loss to shippers, for when agent's charges, &c., are deducted, they leave about 5s. 5d. to pay for cost of fish, curing and packing, freight and insurance.

Coal.—Under this head is classed, in the local statistics, patent Coal. fuel, of which a large quantity is imported. As I have pointed out before, the higher prices that ruled through 1889—owing to the numerous strikes at home, and the increased demands of reviving trade—have had no effect in checking orders from Italy.

The total import of the kingdom shows an increase in spite of high prices, and the import at Leghorn has increased in even greater proportion, being 214,307 tons in 1888 and 227,230 tons in 1889.

As regards coal Leghorn holds its own as the base of distribution for all Tuscany, and even well beyond its borders, for it is despatched from here across the Apennines to all inland centres as far north as Bologna, where Leghorn importers begin first to experience the competition of those of Venice.

So far the coal supply of this wide district is furnished entirely by England, but German coal is forcing its way into the north of Italy, and I learn that in consequence of the rising prices several large orders have been given to France for coal, as well as for patent fuel.

Freights naturally fluctuate according to season and demand, but during the past six months they have averaged from 9s. 6d. to 11s. from Glasgow; from 9s. 6d. to 11s. 9d. from Newcastle; and from 9s. 6d. to 12s. 9d. from Cardiff.

Olive oil.—This product continues to be an important article of export from this place, for Leghorn is the focus of the Tuscan olive oil trade, and the olive oil of Tuscany still maintains a high reputation as a pure oil for table use. Olive oil.

But a considerable falling-off is to be noticed in the export of this as well as of most of the agricultural products of the country.

In 1882 and 1883 the olive oil exported from Leghorn amounted to 4,813 tons and 4,132 tons respectively, whereas in 1887 the total export had fallen to 3,811 tons, and in 1888 to 2,109 tons. The proportion of the whole export which goes to the United Kingdom shows, however, a slight increase.

The trade to the United Kingdom in Tuscan olive oil is almost wholly in the hands of one large English firm long established in this place, and four-fifths of the oil sent to Great Britain is sent direct to London in their own steamers. The best quality of Tuscan olive oil, known in the trade as "Lucca oil," is shipped in casks, not in flasks, to one or two of the leading

Italian warehousemen in London, and it is there bottled, labelled, and distributed through grocers to the public.

The deception, to which attention has been once or twice called in these reports, of sending empty "Florence flasks" to the United Kingdom, there to be filled with any adulterated compound, or with cotton-seed oil pure and simple, still continues, but in a diminishing degree, so it may be concluded that the public is getting alive to the imposition in that manner practised.

The rupture of commercial relations with France has seriously affected the export of this product to Marseilles, Nice and Bordeaux, and very little is now sent to France from Leghorn.

Will send further report on industries when manufacturing districts have been visited.

Of the condition of the cotton, jute, linen, wool, and iron industries of this district I prefer not to write until I have had further opportunities of visiting the manufactories and judging of the progress made by them in production.

The rise on all sides of these national industries is a matter of such great interest, and of such real importance to British trade, that I feel too close attention cannot be paid to them. Full descriptions of those that have been established here, and of the conditions under which they work, I hope to be able to furnish in a future and less general report.

Shipping.

Shipping.—The returns of British shipping, in tables F¹, F², and F³, show a variation that faithfully reflects the changes exhibited by the general trade of this port during the same period; that is to say, a sudden expansion in 1887, and as sudden a decline in 1888, and a partial recovery in the next year. The direct carrying trade of Great Britain with this port, it will be noticed, tends to decrease, whilst the indirect or carrying trade in British vessels from and to other countries shows a tendency to increase.

Harbour works.

Leghorn Harbour Works.—The work of dredging and deepening both the outer and inner harbours so as to admit with ease and safety the passage of ships of the deepest draught, continues steadily, but much more slowly than was provided for in the original estimates. The time first fixed for the completion of the works was the end of 1890, but I am told that years will elapse yet before the deepening of the two harbours is completed according to the original plans. The importance of the work to the commerce of the port is urgently felt, and a strong appeal has just gone up from the Chamber of Commerce to the Government to expedite the work.

As a report has lately been sent in from this consulate to the Hydrographic Department, accompanied by plans, of the present stage of process of the harbour works, I will say no more now than that the space deepened in the outer harbour to a depth of 9 metres has been extended to an area 600 metres in length by 280 in breadth, and that the old harbour is deepened in the centre to a depth of 6½ metres, and in parts to a depth of 7 and 7½ metres. Before long I hope to be able to obtain and forward plans showing the exact channels and areas deepened since the last report sent in.

Petroleum.

Petroleum.—A reservoir for the storage of petroleum, capable

of containing about 3,000 tons of oil, has been constructed at this port. It has been made at the cost, and is the property of the firm of Nöbel, of St. Petersburg, to whom the municipality gave the ground free. The reservoir was just filled in April last, and from that month to the end of the year three "bateaux citernes," or ships fitted to carry oil in bulk, arrived here from Batoum, and each discharged from 1,000 to 1,500 tons of oil into the new reservoir.

The same firm has set up workshops alongside the reservoir for the making of tin cases and wood boxes, in which the oil is now despatched by rail to the inland centres.

The shipbuilding yard of Messrs. Orlando Bros. has been during the past year, and will be for several years to come, full of work, as they have still large orders in hand for the Government.

The yard has completed for the Government during the past 12 months the following work:—The torpedo ram cruiser, the "Fieramosca," a vessel of 3,800 tons burden, which attained at her late trials a speed of close upon 18 knots; five pontoons to sink torpedoes built of steel, and one pontoon for gun trials, also of steel.

The work now in hand for the Government consists of three torpedo cruisers, the "Etruria," "Umbria," and "Aretusa," all of which were begun in August and September, 1888, and are now in an advanced stage of completion. There is also under construction a small vessel of 300 tons burden, destined, it is stated, for river work in South America.

During the past 12 months the yard has also carried out repairs to the engines and hulls of 12 merchant steamers, and converted the engines of the steamship "Ortigia" from compound to triple expansion.

The area of the yard has been increased by about 3,600 square yards by the demolition of a group of houses formerly used as offices, and more space has been gained by this for building slips, thus enabling to be constructed at one time:—

1	vessel	up to 150 metres in length, or	493·02 feet.
2	"	" 110 "	" 361·68 "
1	"	" 80 "	" 263·04 "
2	"	" 75 "	" 246·60 "

The yard employs at the present time an average of 1,400 hands.

Leghorn Dry Dock.—The great event of the year for shipping has been undoubtedly the opening of the new, or rather enlarged, dry dock, which was completed last month.

The dimensions of the new dock are:—Extreme length, 135 metres (443·89 ft.); extreme breadth, 22·10 metres (72·66 ft.); and 7·10 metres (23·34 ft.) depth on extreme sill.

The charges for docking are:—For screw steam-ships or sailing-vessels under 400 tons burden, 80 cents. for every ton of the vessel's burden for the first day, and 40 cents. for every succeeding day in the dock. And for paddle-ships 4 fr. for every single horse-power for the first day, and 2 fr. for every succeeding day.

But for every ton exceeding 400 this charge is reduced by one-half.

The dry dock is the property of the Italian Government, but it has been leased to the firm of Orlando Bros. until the year 1920.

Leghorn
clearing-house
returns show a
decline of
operations.

P.S.—Since the remarks made in the beginning of this report upon the relatively stagnate condition of trade at the port were written, the returns of the Leghorn commercial clearing-house have been published, and I cannot do better than conclude this report with them, as they afford strong additional evidence of the truth of what I have said.

In 1882 there were but six clearing-houses in Italy, and of these six only those of Leghorn and Milan had attained any development. The sum total of the operations effected in the clearing-house of Leghorn for the year 1883 amounted to 40,720,000*l.*; in that of Milan, which came next in importance, to 33,960,000*l.*; whilst that of Genoa reached only the insignificant total of 440,000*l.*

Five years later, in 1888, we find a most complete change in these figures. The published returns of the clearing-houses of the kingdom show that the operations in that of Genoa had attained, in 1888, the large total of 111,237,834*l.*, whilst that of Leghorn shows a diminution in the total of its operations to 36,817,058*l.* And it is worthy of remark that in Florence, where no clearing-house existed, the total of sums liquidated in 1889 equalled 122,743,309*l.*

I should, however, add that the system of the liquidation of debts by means of a common clearing-house is one of a very recent growth in Italy. Before 1881, Leghorn was the only town that possessed a clearing-house of any kind. In that year the Italian Government was contemplating the abolition of the “*cours forcé*,” or compulsory paper currency, and a loan of 644,000,000 fr. was contracted—444,000,000 fr. in gold, and 200,000,000 fr. in silver—to enable the resumption of specie payments to be carried out. Every possible means were, at the same time, sought for and encouraged, in order to economise the use of metallic money, and amongst the means adopted, the establishment of clearing-houses in the chief commercial centres of the kingdom was one.

By royal decree, the chambers of commerce of 13 of the chief cities were charged to invite the bankers and principal merchants of their respective centres to group themselves, and form clearing-houses for this purpose, and though some of these do not seem to have taken root and flourished, there exist at this moment clearing-houses in eight of the chief cities of Italy, a larger number, curiously enough, than are to be found in the United Kingdom, where credit is so much more highly developed.

Table A.—SHOWING the General Position of Trade at the Port of Leghorn of late years so far as Statistics are obtainable.

	1874-1876.	1877-1879.	1880-1882.	1883-1885.	
				Currency.	Sterling.
	Lire.	Lire.	Lire.	Lire.	£
Official values of all imports during the four triennial periods embracing the years 1874-1895 inclusive	272,711,970	215,380,573	207,572,450	210,423,787	8,416,951
Official values of all imports during the same triennial periods ...	180,531,143	185,604,344	167,549,809	162,872,254	6,514,890

	1886.		1887.		1888.	
	Currency.	Sterling.	Currency.	Sterling.	Currency.	Sterling.
	Lire.	£	Lire.	£	Lire.	£
Official values of all imports during the last three years, taken separately, viz., 1886, 1887, and 1888	74,126,991	2,965,079	81,443,137	3,257,725	57,069,447	2,282,778
Official values of all exports during same years... ..	41,916,050	1,677,162	38,231,807	1,529,272	27,743,109	1,109,724

NOTE.—None of the above values before 1881 are expressed in gold, for the depreciation of the Italian paper currency was, between 1867 and 1881, a constantly varying quantity, the premium upon gold varying between 20 per cent. in the first of those years to 8 per cent. in 1881, or the year before the resumption of specie.

Table B.—GENERAL Table of Imports.

Number.	Categories.	Values.		
		1886.	1887.	1888.
		£	£	£
I.	Spirits—beverages (including wines) and oils	186,254	169,794	122,312
II.	Colonial produce—groceries and tobacco	417,958	432,349	402,809
III.	Chemicals, medicinal drugs, resins, and perfumery	86,407	96,683	73,860
IV.	Colours, paints, and dyes	38,075	36,142	36,506
V.	Hemp, flax, jute, and other fibrous textiles except cotton	59,708	79,969	41,989
VI.	Cottons	163,315	235,713	103,100
VII.	Wool and hair textiles	137,831	172,301	81,240
VIII.	Silks	23,863	29,680	21,127
IX.	Timber and straw (including furniture and hats)	24,282	31,303	17,579
X.	Stationery and books	6,863	5,714	5,730
XI.	Hides and furs	214,058	112,057	122,782
XII.	Metals, manufactures of, and minerals	291,762	590,722	362,571
XIII.	Stones (including coal and marble), earthenware and glass	218,587	243,934	218,232
XIV.	Cereals—flour and vegetable produce not comprised in other categories	746,995	652,611	323,807
XV.	Live animals and animal produce not comprised in other categories	310,367	336,059	334,526
XVI.	Other and sundry articles	33,753	32,696	14,607
	Total	2,965,078	3,257,725	2,282,777
	Goods entered inwards for transit	103,182	134,081	62,704
	Total value of all imports	3,068,260	3,391,806	2,345,481

Table C.—GENERAL Table of Exports.

Number.	Categories.	Values.		
		1886.	1887.	1888.
		£	£	£
I.	Spirits - beverages (including wines) and oils	151,685	206,685	121,569
II.	Colonial produce—groceries and tobacco	148,922	111,791	79,775
III.	Chemicals, medicinal drugs, resins, and perfumery	184,502	192,385	124,592
IV.	Colours, paints, and dyes	8,488	15,048	5,298
V.	Hemp, jute, and other fibrous textiles, except cotton	184,237	160,993	112,571
VI.	Cottons	5,270	4,204	3,011
VII.	Wool and hair textiles	25,628	18,542	7,594
VIII.	Silks	46,260	19,529	24,640
IX.	Timber and straw (including furniture and hats)	246,841	154,869	85,034
X.	Stationery and books	12,848	5,017	21,174
XI.	Hides and tannery	68,103	82,476	73,258
XII.	Metals, manufactures of, and minerals	58,223	70,169	60,078
XIII.	Stones (including coal and marble), earthenware, and glass	300,822	197,019	171,767
XIV.	Cereals—flour and vegetable produce not comprised in other categories ..	32,462	22,464	27,632
XV.	Live animals and animal produce not comprised in other categories ..	275,987	253,965	181,317
XVI.	Other and sundry articles	16,416	19,114	10,415
	Total	1,716,644	1,529,270	1,109,725
	Goods cleared outwards for transit	103,182	134,081	52,704
	Total value of all exports ..	1,819,826	1,663,351	1,162,429

Table D.—RETURN of Principal Articles of Import into Leghorn, Showing the Total Value and Total Quantities Imported, with the Proportion that comes from the United Kingdom.

Articles.	1886.			1887.			1888.		
	Total Quantity.	Proportion from United Kingdom.	Total Value.	Total Quantity.	Proportion from United Kingdom.	Total Value.	Total Quantity.	Proportion from United Kingdom.	Total Value.
	Tons.	Tons.	£	Tons.	Tons.	£	Tons.	Tons.	£
1. Iron, pig and scrap	27,906	17,507	84,553	42,040	31,778	117,719	27,081	20,911	75,687
2. " and steel rails	6,575	2,034	33,402	5,200	1,505	33,665	661	166	3,305
3. " manufactures of all kinds, except machinery	7,128	3,819	66,798	7,386	4,973	73,386	5,328	3,337	52,540
4. Machinery	960.6	718.8	45,531	1,452	872	68,236	1,095	609.9	24,220
5. Coal and coke	201,945	200,522	185,773	230,241	229,559	211,821	214,307	214,307	197,162
6. Wheat	66,052	21,033*	541,633	61,949	25,460*	468,391	32,664	4,442*	287,440
7. Coffee	797	786	52,604	1,100	1,045	87,990	879.5	872.4	73,884
8. Sugar	1,975	1,581	27,541	7,936	3,182	117,456	893.6	888.5	12,430
9. Cured fish	9,037	6,074	216,900	9,339	5,026	236,140	9,266	5,080	224,789
10. Cotton, raw	597	281	27,860	784.9	697.8†	33,806	619.4	534.9†	28,490
11. " yarns and thread	490	476	51,915	333.6	326.5	38,559	119.8	115.8	15,548
12. " tissues... .. .	548	485	90,139	948	862	163,387	331.4	288.9	59,060
13. Wool, cleaned and undcleaned.. .. .	476	17.1	51,397	667.5	17.5	55,767	416.9	3.27	44,472
14. Woolen yarns and tissues	229	161	79,446	319.8	128.8	110,303	164.5	118.7	34,096
15. Jute, raw	1,018	1,015†	14,354	2,506	2,163†	35,080	197	187.1	2,915
16. " tissues	192	190	11,368	113	106.7	5,580	108.7	90.3	10,351

* Of this there came from India in 1886 16,612 Tons.
 † From British India in 1887 there was imported 528 Tons.
 ‡ From British India in 1888 741 Tons.
 In 1888 all British wheat imported came from India.

Table E.—RETURN of Principal Articles of Export from Leghorn, Showing Total Values and Total Quantities Exported, with Proportion sent to United Kingdom.

Articles.	1886.			1887.			1888.		
	Total Quantity.	Proportion to United Kingdom.	Total Value. £	Total Quantity.	Proportion to United Kingdom.	Total Value. £	Total Quantity.	Proportion to United Kingdom.	Total Value. £
Olive oil	2,683	1,461	128,771	8,811	2,072	190,536	2,109	1,262	101,246
Wine in casks	32,135,422	1,927,250	20,259	25,740,000	1,804,000	14,040	13,578,400	1,889,800	7,406
Wine in bottles	22,707	7,663	1,726	10,688	1,122	748	166,499	19,863	11,650
Hats	1,585,850	769,920	107,837	778,332	122,960	62,266	640,947	59,710	43,584
Boric acid	3,052	1,257	61,037	2,878	2,157	61,009	1,200	664.7	26,396
Marble and alabaster, rough and in blocks	13,961	4,098	44,221	15,923	4,523	72,998	11,991	3,502	40,377
Marble and alabaster, worked	12,196	4,031	225,948	6,916	1,850	121,269	5,090	1,686	117,013
Coral, worked	13,52	10,99*	124,184	13,21	15,08*	131,148	17,70	15,01*	127,440
Candied fruits	2,044	555.6	143,102	1,652	32.42	108,626	1,081	36.2	75,698
Hides	526.6	517.3	57,944	1,080	1,071	73,421	1,239	1,220	71,402

* All this worked coral was exported to British India, where the demand for this product of Italian industry seems to be increasing.

Table F².—RETURN of British Shipping at the Port of Leghorn during the Year 1888.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.					Cleared.				
Total Number of Vessels.			Total Tonnage.			Total Tonnage.			Total Value of Cargoes.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	Total Number of Crews.
319	1	320	256,620	1,416	258,036	173	1	174	151,246
									4,168
									...

(867)

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.										Cleared.									
Countries whence Arrived.			Number of Vessels.			Tonnage.			Value of Cargoes.	Countries to which Departed.			Number of Vessels.			Tonnage.			Value of Cargoes.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.		With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	
Italy	2	6	1,542	8	6,189	4,647	15,834	387	...	Italy	11	23	11	83	34	12,127	25,088	612	...
United States	10	10	15,834	2	1,117	700	4,389	102	...	Black Sea Ports...	26	83	26	17	34	82,196	82,196	1,751	...
France	1	1	417	5	1,117	700	4,389	102	...	United States	2	15	2	17	17	39,571	39,571	946	...
Russia	5	5	4,389	1	123	...	1,022	304	...	Spain	...	5	...	...	...	14,525	14,525	387	...
Holland	1	1	123	...	...	...	...	...	...	France	...	6	...	...	...	3,574	3,574	137	...
Spain	2	1	1,022	3	1,826	...	...	...	...	Algeria	...	4	...	...	...	6,703	6,703	141	...
									...	Greece	...	2	...	...	...	4,344	4,344	96	...
									...	Holland	...	2	...	...	...	222	222	10	...
									...	Turkey	...	2	...	...	...	1,135	1,135	28	...
									...	Austria	...	1	...	...	...	1,246	1,246	36	...
									...	Prussia	...	1	...	...	...	140	140	6	...
									...	Belgium	...	1	...	...	...	891	891	17	...
									...	Tripoli	...	1	...	...	...	1,303	1,303	24	...
Total indirect	...	29	...	...	28,878	...	...	700	...	Total indirect	...	138	...	...	...	181,868	181,868	4,092	...
Add total direct...	...	320	...	...	298,036	...	...	7,423	...	Add total direct...	...	174	...	...	...	151,246	151,246	4,168	...
Gross total entered	...	349	...	...	327,014	...	...	8,123	...	Gross total cleared	...	357	...	...	...	333,114	333,114	8,260	...

C

Table F³.—RETURN of British Shipping at the Port of Leghorn during the Year 1889.
Direct Trade in British Vessels from and to Great Britain and British Colonies.

(75 5 | 90—H & 8867)

Entered.					Cleared.				
Total Number of Vessels.			Total Tonnage.			Total Tonnage.			Total Value of Cargoes.
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	Total Number of Crews.
302	2	304	301,156	3,542	304,698	161	152,585	152,585	4,237
									...

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.										Cleared.									
Countries whence Arrived.	Number of Vessels.			Value of Cargoes.	Tonnage.			Number of Crews.	Value of Cargoes.	Countries to which Departed.	Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.	
	With Cargoes.	In Ballast.	Total.		With Cargoes.	In Ballast.	Total.				With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.			
Italy ...	3	8	11	2,282	7,504	9,786	227	2	Italy ...	14	38	52	16,710	38,630	55,340	1,244	...		
Russia ...	23	23	23	23,171	...	23,171	1,061	...	Russia ...	77	77	77	81,043	81,043	81,043	1,564	...		
United States ...	10	10	10	15,081	...	15,081	1,061	...	United States ...	19	22	19	26,023	26,023	26,023	643	...		
Belgium ...	6	6	6	5,886	...	5,886	132	...	Spain ...	22	22	22	664	664	664	145	...		
Egypt ...	3	3	3	2,241	...	2,241	47	...	Algeria ...	1	6	7	8	7,246	7,246	160	...		
Holland ...	2	2	2	1,506	...	1,506	37	...	Greece ...	4	8	4	4,281	4,281	4,281	87	...		
Spain ...	2	2	2	1,171	...	1,171	27	...	Belgium ...	...	...	...	...	...	...	...	...		
France ...	...	1	1	...	...	...	26	...	Turkey ...	...	...	...	...	...	...	...	...		
	...			...	...	...	...	...	Tunis ...	...	...	...	...	...	...	...	...		
	...			...	...	...	...	...	France ...	...	...	...	...	...	...	...	...		
	...			...	...	...	...	...	Egypt ...	...	...	...	...	...	...	...	...		
	...			...	...	...	...	...	Tunis ...	...	...	...	...	...	...	...	...		
	...			...	...	...	...	...	Portugal ...	...	...	...	...	...	...	...	...		
Total indirect	...	...	88	...	...	60,937	1,368	...	Total indirect	...	...	202	...	212,497	4,636	...	...		
Add total direct	...	...	304	...	...	304,698	7,489	...	Add total direct	...	...	101	...	105,866	4,237	...	...		
Gross total entered	...	...	392	...	...	395,635	8,857	...	Gross total cleared	...	...	363	...	365,182	8,873	...	...		

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FOREIGN OFFICE.
1890.
ANNUAL SERIES.

Nº. 741.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

ITALY.

REPORT FOR THE YEAR 1889
ON THE
TRADE OF THE DISTRICT OF BRINDISI.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1890.*

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650. New Orleans	1d.	712. Mogador	2d.
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653. Tripoli	1d.	715. Rio de Janeiro	2½d.
654. Buenos Ayres	1d.	716. Newchwang	1d.
655. Paris	1d.	717. Chinkiang	1d.
656. Cherbourg	1d.	718. San Francisco	6d.
657. Warsaw	1d.	719. Bussorah	1d.
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674. Boulogne	1d.	736. Nantes	1d.
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ITALY.

BRINDISI

Consul Cocoto to the Marquis of Salisbury.

My Lord,

Brindisi, April 19, 1890.

I HAVE the honour to enclose herewith my Annual Report on the Commerce and Agriculture of the Province of Lecce for the year 1889.

I have, &c.
(Signed) S. G. COCOTO.

Commercial Report for the Year 1889.

The increase in the maritime operations of this port, indicated in my report for 1888, has been fully maintained as regards the number of vessels frequenting the port. The falling-off of 70,639 tons in total tonnage is attributable to the fact that the "Navigazione Generale Italiana" having made Venice a port of Registry for vessels employed on their Adriatic lines, a certain number of steamers have been set apart for such services of slightly smaller aggregate tonnage than those previously running. This change has had for result the diminution of total figures referred to, the number of voyages performed, however, remaining the same.

Brindisi—
Importance of
maritime
operations in
1889 fully
maintained.

The figures for the past three years have been :—

Year.	Number of Ships.	Total Tonnage.	Total Ton- nage.
1887	1,207	900,771	
1888	1,260	1,862,198	
1889	1,265	1,291,554	

The diminution in the importance of commercial exchanges between Italy and France, consequent on the cessation of Commercial Treaty relations alluded to in my last report, has continued during 1889, not a single cask of wine, so far as I can learn, having been exported from Brindisi to France during the year. This

Diminished
exchanges
with France.

Quantities of
wine for-
warded from
Brindisi
during 1889
and 1888.

Increase of
coal imports.

has necessarily had an adverse influence on the normal development of the carrying trade of this port, the wine which in former times was exported to France for blending purposes, having been during 1888 and 1889 forwarded to North Italy by rail and sea in the proportions of 29,000 tons by rail and 13,000 tons by sea—total 42,000 tons during 1889, as against 25,000 tons by rail and 9,000 tons by sea during 1888; total 34,000 tons—increase 8,000 tons.

An increase of some 20 steamers with coal cargoes has taken place in 1889 as compared with 1888, the additional quantity imported having been equal to nearly double the imports of 1888. This increase may be attributed in a measure to the fact that stocks were kept low in 1888 in the hopes of a fall in prices. This fall has not occurred, and importers have necessarily been compelled to import at the prices ruling.

RETURN of all Shipping at the Port of Brindisi during the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	2	1,051	239	460,548	241	461,599
Italian ...	120	12,000	478	480,200	598	442,200
Austrian ...	16	1,333	230	325,712	246	328,045
German ...	...	...	35	40,579	35	40,579
Greek ...	40	1,600	52	13,524	92	15,124
Belgian ...	...	...	...	...	...	...
Norwegian ...	...	...	2	1,604	2	1,604
Montenegrin ...	10	150	...	...	10	150
Turkish ...	40	1,280	...	...	40	1,280
Danish ...	...	...	1	973	1	973
Total ...	228	17,414	1,037	1,274,140	1,265	1,291,554

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	1	176	236	458,940	237	459,116
Italian ...	116	11,550	476	428,401	592	439,951
Austrian ...	16	333	230	325,712	246	328,045
German ...	...	...	34	39,499	34	39,499
Greek ...	37	1,600	52	13,524	89	15,124
Belgian ...	...	...	...	...	...	...
Norwegian ...	...	...	2	1,604	2	1,604
Montenegrin ...	10	150	...	...	10	150
Turkish ...	40	1,280	...	...	40	1,280
Danish ...	...	...	1	973	1	973
Total ...	220	15,989	1,031	1,269,653	1,251	1,285,642

Coal
importers.

The Peninsular and Oriental Steam Navigation Company consumes but a relatively small quantity of the coal imported, their importations during 1889 having been only about 7,700 tons; the Navigazione Generale Italiana about 25,000 tons; private

importers about 5,000 tons; the railway companies and the Patent Fuel Works importing the remaining 70,000 tons.

The Patent Fuel Works have been enlarged, and are now able to deliver 300 tons of patent fuel per diem to the railways. Patent Fuel Works.

The coal imports to the port of Brindisi during the past three years have been as follows:—

From—	1889.	1888.	1887.
	Tons.	Tons.	Tons.
Great Britain	122,386	64,291	92,323
France	684	562	949
Austria	380	783	405
Total	123,450	65,636	93,777

The Customs' figures which are here given, as to the total coal imports from Great Britain, in 122,386,000 kilos., are slightly higher than the figures I had obtained from other sources; but my statistics being necessarily taken from official sources I have given the official figures also as regards coal.

The British shipping which has used the port of Brindisi during 1889 was composed of:— British shipping.

Services.	1889.		1888.	
	No.	Tons.	No.	Tons.
P. and O. S. N. Co., Alexandria, Brindisi and Venice service	52	98,072	59	93,717
P. and O. S. N. Co., India, China and Australia service	104	266,438	99	245,866
Cunard and Leyland lines	19	25,912	21	29,004
Vessels with coal and pitch	56	63,138	36	40,869
„ „ empty casks	..	..	2	1,453
„ in ballast for orders and bunkers ..	10	8,039	7	6,900
Totals	241	461,599	224	417,309

The increase in the number of British vessels is mainly accounted for by the increased coal importations; the augmented tonnage by the steady increase in the size of all passenger and cargo steamers as compared with those formerly employed. Increase in number and tonnage.

During the year the tonnage of the vessels employed in the P. and O. Co.'s services increased, as compared with 1888, 24,924 tons, reaching the total of 364,510 tons during the same period.

13,699 passengers arrived here by P. and O. Co.; 3,385 disembarked; 2,982 embarked, and 13,296 sailed. Passengers carried by the P. and O. S. N. Co.

Crews.

The aggregate British crews which visited Brindisi during 1889, as compared with preceding years, were:—

1887	..	..	..	..	..	..	15,202
1888	..	..	..	..	..	..	26,300
1889	..	..	..	..	..	..	27,927

The Cunard and Leyland Lines have maintained their connection with the port, bringing cargo for consumption in this district and transhipment cargo for Greek ports, and taking a share in the coasting trade to Adriatic ports, and loading argols and soapstock for transhipment at Liverpool for New York.

Mail services

The mail services from Brindisi are at present as follows:—

WEEKLY.

Corfu and Patras	..	{	Thursdays, 12 p.m.	}	Navigazione Generale Italiana
Corfu, Piræus, and Constantinople		{	Sundays, midnight	}	Italiana
Corfu, Piræus, Patras and Constantinople		{	Wednesdays, midnight	}	Italiana
Alexandria ..	..	{	Sundays, midnight	..	Austrian Lloyds
Ancona, Venice, and Trieste		{	Saturdays, midnight	..	Austrian Lloyds
Port Said, Aden, and Bombay		{	Three or four times weekly	}	Austrian Lloyds and Navigazione Generale Italiana
Malta, Gibraltar, and London		{	Sundays, about 9 p.m.	..	P. and O. S. N. Co.
		{	Saturdays or Sundays after arrival from Port Said	}	P. and O. S. N. Co.

FORTNIGHTLY.

Alexandria ..	..	{	Alternate Sundays at about 9 p.m.	}	P. and O. S. N. Co.
China, Japan, and Australia		{	Alternate Sundays at about 9 p.m.	}	P. and O. S. N. Co.
Ancona and Venice		{	Alternate Saturdays or Sundays	}	P. and O. S. N. Co.

MONTHLY OR FOUR WEEKLY.

Bombay	..	..	5th of each month	..	Austrian Lloyds
Calcutta, China, Japan, Australia		{	Thursday each fourth week	}	North German Lloyds

Commencing in June next some modification will take place in the mails homeward from India, China, and Australia. Owing to change in sailing dates at departure ports, the vessels will arrive here later than heretofore, on Sundays during the summer, on Saturdays in Winter.

During 1888 it appeared as though a definite daily mail communication was to be established between Brindisi and Greece, at that time there were three Greek steamer departures, three Italian and two Austrian.

The three Greek sailings and one Austrian have been abandoned.

**RETURN of Principal Articles of Exportation during
the Years 1889-88.**

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Wine	Tons ...	2,993	\$5,915	2,480	\$41,770
Oil	" ...	1,553	74,558	1,208	60,400
Figs	" ...	2,522	23,243	4,511	52,523
Tartars	" ...	187	11,200	248	16,342
Stones, earths, &c. ...	" ...	33	44	120	273
Pottery	" ...	219	1,339	465	2,790
Empty casks	Hect. ...	9,512	2,663	20,106	4,825
Chemicals, dyes ...	Tons ...	14	739	6	369
Soap	" ...	8	23	4	86
Sulphur	" ...	15	42	19	54
Grain	" ...	13	98	14	90
Macaroni	" ...	8	163	7	124
Fruits, seeds, &c. ...	" ...	27	232	39	883
Corals	" ...	...	50,570	...	60,778
Silk, silkworm eggs ...	" ...	...	1,680	1	3,562
Sundries	" ...	377	37,757	111	8,877
Hats	Number ...	49,771	3,385	150,273	12,022
Total casks	Hect. ...	9,512	} 248,641	20,106	} 265,768
" hats	Number ...	49,771		150,273	
" tons	Tons ...	7,974		10,233	

EXPORTATION.

The annexed return gives only the exports to foreign countries, and represents a falling-off in figures as compared with 1888. Diminution in exportation.

Under the heading of wine the falling-off is apparent, as wine for foreign countries was shipped hence to Genoa and Naples for transhipment principally to South America, and therefore appears in the coasting trade returns. Wine.

Oil exports show a small increase; figs, on the contrary, have decreased, as the crop, owing to persistent rain during the drying season, was of indifferent quality and short in quantity. Oil, figs.

The fact that, exceptionally this Lent, Catholics had permission from their church to eat meat, has had a severe effect on the fig market, the peasants of North Italy, who consumed large quantities of figs during Lent, this year bought none, and holders have had to sacrifice their goods for distillery purposes.

The diminution in the tonnage of argols exported is to be accounted for, inasmuch as, though the wine crop of this province was much heavier than in previous years, a much larger proportion of the crop was exported in the form of grapes for enological purposes than heretofore, the diminished production of tartars being a necessary consequence. Argols, tartars.

The exportation of empty casks in 1888 and 1889 has been one of the consequences of the cessation of wine shipments to France. Empty casks.

The large number of casks formerly necessary being no longer required, owners have simply sold them to get rid of their surplus stocks.

RETURN of Principal Articles Imported during the Year 1889.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Wine	Tons	2	£ 41	1	£ 121
Spirits	"	5	187	2	42
Oil	"	204	8,563	...	...
Petroleum and other mineral oils	"	6	180	7	260
Coffee	"	91	7,671	75	6,000
Sugar	"	8	212	41	580
Pepper	"	...	...	3	190
Acids... ..	"	...	...	9	144
Sulphates	"	19	355	41	506
Chemicals	"	6	348	15	1,200
Dyes	"	61	10,622	15	1,516
Firewood	"	201	201	338	265
Timber	"	2,808	7,773	2,621	4,718
Furniture	"	18	839	17	984
Rushes	"	181	1,088	523	4,184
Wall papers... ..	"	2	128	10	500
Railway bars	"	85	1,019	4,339	22,165
Bricks, stones, &c.	"	19	29	363	2,594
Coal	"	122,386	137,684	65,424	60,130
Grain	"	1,277	9,503	712	5,466
Flour... ..	"	10	127	36	298
Seeds, fruit, &c.	"	...	...	171	3,210
Iron machinery	"	5	200	67	2,239
Empty casks	Hect... ..	4,093	1,146	7,755	1,862
Animals	Number	2,546	42,000	1,347	25,802
Game, poultry, fish	Tons	10	827	10	...
Other articles	"	208	42,670	160	12,106
Total tons	"	127,615	} 278,413	74,993	} 167,242
" casks	Hect.	4,093		7,755	
" animals	Number	2,546		1,347	

IMPORTATION.

Under this heading an increase is noticeable under every category, except those of little importance.

Rails.

No railway bars were imported, as no new railway lines are at present under construction in this vicinity. The falling-off in the capacity of empty casks imported has already been referred to.

Oil.

A small quantity of oil was imported from Greece—an unusual circumstance.

Coal.

An additional quantity of 56,962 tons of coal was imported over that received in 1888, and a larger quantity of horses and cattle arrived from Albania.

Horses.

Cattle.

The valuation rates are those of the Italian custom-house, assessed by ministerial circular, independent of the market prices of the articles valued.

TABLE showing the Total Value of all Articles Exported from and Imported into Brindisi to and from Foreign Countries during the Years 1889-88.

Country.	Exports.		Imports.	
	1889.	1888.	1889.	1888.
	£	£	£	£
America	27,568	36,148	86	3,780
Austria	36,475	61,726	36,812	12,325
Belgium	2,230	3,228	324	22,197
Egypt	28,979	33,722	9,628	3,103
France	7	16,988	3,000	7,390
Germany	4,579	8,011	6,272	1,972
Great Britain	17,839	5,730	148,478	64,390
Greece	14,732	24,172	11,036	4,181
India	7,018	4,790	12,179	1,870
" (corals)	50,570	60,778	..	..
Japan	17	..	240	..
Montenegro	..	..	..	..
Russia	6,875	3,995	4,414	2,363
Turkey	25,146	6,360	3,236	33,149
Other countries.. ..	26,606	120	3,723	522
Total	248,641	265,768	243,928	157,242

During 1889 the coastwise traffic from and to Brindisi has Trade coast- assumed considerable importance, nearly attaining 50,000 tons, wise. having been—

UNLOADED.						Tons.
Corn and flour	..	..	..	..	..	5,590
Sugar	..	..	..	..	..	252
Timber	..	..	..	..	..	732
Minerals	..	..	..	..	..	127
Other articles	..	..	..	..	..	7,715
Total	..	..	..	..	..	14,716

LOADED.						Tons.
Oils	..	..	..	..	..	1,083
Corn, &c.	..	..	..	..	..	14,142
Dried fruits	..	..	..	..	..	5,506
Wine	..	..	..	..	..	13,100
Other articles	..	..	..	..	..	1,286
Total	..	..	..	..	..	35,117

This was brought and conveyed away by—

				Unloaded.	Loaded.
				Tons.	Tons.
Sailing ships	..	..	..	4,310	11,881
Steamers	..	..	..	10,406	23,236
Total	..	..	..	14,716	35,117

Foreign trade. The carrying trade between Brindisi and foreign countries may be similarly summarised :—

UNLOADED.						
						Tons.
Coal	..	..	..	..	..	122,386
Cereals	..	..	..	..	..	476
Timber	..	..	..	..	..	2,803
Oil	..	..	..	..	..	203
Other articles	..	..	..	..	..	54,666
Total	..	..	..	..	..	180,539

LOADED.						
						Tons.
Oil	..	..	..	..	..	1,553
Wine	..	..	..	..	..	29
Dried fruits	..	..	..	..	..	2,521
Pottery	..	..	..	..	..	217
Other articles	..	..	..	..	..	9,995
Total	..	..	..	..	..	14,315

This was brought and carried away by—

			Unloaded.	Loaded.
			Tons.	Tons.
Sailing ships	..	..	2,649	346
Steamers	..	..	177,890	13,969
Total	..	..	180,539	14,315

The gross total results being that 195,255 tons were unloaded, and 49,432 tons loaded, making 244,687 tons, the total movement of the year.

Port works.

The deep water quay referred to in my previous reports is now finished, affording ample space for all deep-draught steamers using the port to come alongside at any hour of day or night to land and embark mails, passengers and merchandise.

Town improvements.

The Brindisi municipality are now about spending 2,500L to complete the paving of the Marina with lava stone, the comfort and convenience of passengers will thus be materially augmented should they walk to the train at port station from steamer.

To embellish the Marina, a slice has been cut off the custom-house façade which is being rebuilt to afford more quay accommodation. Various old houses have been or are to be pulled down, and the appearance of the town from the sea will be improved by the rebuilding of the ancient Montenegro Palace, which has been purchased by the Peninsular and Oriental Steam Navigation Company, who are erecting handsome and commodious offices on the site.

GALLIPOLI.

Mr. Vice-Consul Zarb reports as follows:—

The movement of shipping at this port during 1889 has undergone no extraordinary development on that of the preceding year.

The following have been the figures:—

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	9	869	5	4,673	14	5,542
Italian	201	14,096	188	143,378	389	157,474
Danish	1	135	4	3,404	5	3,539
German	1	159	2	1,481	3	1,640
Norwegian	...	...	2	614	2	614
Austrian	5	527	1	322	6	849
Greek	1	15	...	...	1	15
Total	218	15,801	202	153,872	420	169,673
„ for the preceding year	197	16,312	196	144,673	393	161,005

The British flag has not been very extensively represented during the year, this is partly owing to the short olive crop of 1888, and the cessation of wine shipments to France. The British flag has, however, lost no more than those of other nations.

The Navigazione Generale Italiana send two steamers each week, and the Puglia and other steamer companies send frequent steamers, as occasion offers, to convey the oil, wine, and other produce of this district to other Italian ports.

The oil crop available for shipment during 1889, in consequence of the indifferent olive yield of 1888, was about 25 per cent. less than the previous year.

The wine crop was, on the contrary, more abundant; the shipments from the port of Gallipoli were, however, owing to the loss of the French market, much less than in previous years. The figures were:—

Country.	1889.	1888.
	Tons.	Tons.
France	841	6,999
South America	2,047	..
Switzerland, Germany, viâ Venice	1,045	42
Italian ports of North Italy ..	5,475	4,767
Total	9,408	11,808

From the above results it will be seen that though an apparent diminution of 2,400 tons in the total wine export appears in 1889 against 1888, a market has been found abroad, and in a fairly satisfactory ratio to the gross figures.

America and central Europe in 1889 took from Gallipoli nearly half as much wine as France took the year previous, which leads to the hope that 1890 may give even more satisfactory figures.

In the annexed tables of exports an increase is observable in the oil, giving an additional export value of 46,000*l*. Of course a

portion of stocks from previous years has been exported to make up for the 1888 crop deficiency.

Empty casks.

The trade in empty casks has suffered through the cessation of the French trade, empties between Italian ports being brought back continually to be refilled.

Breadstuffs.

In the imports the increase is derived mostly from breadstuff; the extension of vineyards has left but little room for grain, which is now imported for consumption.

RETURN of Principal Articles of Export from Gallipoli during the Years 1889-88.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Olive oil	5,647	184,369	4,299	188,839
Wine	9,408	112,149	11,808	88,615
Empty casks	468	1,170	1,805	3,453
Dried figs	1,198	12,781	1,346	11,173
Olive husks	996	1,058	670	674
Firewood	215	496	32	27
Wool	18	606	..	..
Staves and timber	216	514	..	..
Corn and oats	401	3,032	..	..
Flour	23	245	..	..
Beans	23	194	..	..
Grapes	192	967	..	..
Sardines	..	..	21	628
Jennet seed	..	..	20	361
Sundries	..	8,623	..	..
Total	18,805	326,204	20,001	288,770

RETURN of Principal Articles of Import to Gallipoli during the Years 1889-88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Timber of all species ...	Metres ...	4,438	2,371	1,419	1,702
Iron and other metals ...	Tons ...	55	572	5	134
Sugar ...	..	85	1,802	12	98
Coffee ...	..	17	1,544	14	1,139
Codfish ...	..	84	2,120	62	1,637
Sardines ...	..	95	2,808	42	1,254
Petroleum and other mineral oils ...	..	454	4,587	51	4,149
Pepper and drugs ...	..	6	431	2	125
Rice ...	..	30	384	6	64
Staves and hoops ...	..	3,449	6,898	..	..
Sulphur ...	..	1,259	6,708	..	..
Cotton, hemp and flax ...	..	130	4,391	..	..
Corn and oats ...	..	2,425	6,142	..	..
Flour ...	..	4,239	46,661	..	..
Cheese and butter ...	..	125	6,910	..	..
Skins ...	..	33	1,986	..	..
Bulrushes ...	..	..	..	12	105
Beans ...	..	..	..	61	416
Sundries ...	..	..	6,180	..	..
Total ...	{ Tons ... Metres ...	{ 12,686 4,438	{ 100,470	{ 258 1,419	{ 10,823

TABLE showing the Total Value of all Articles Exported from and Imported to Gallipoli to and from Foreign Countries during the Years 1889-88.

Country.	Export.		Import.	
	1889.	1888.	1889.	1888.
	£	£	£	£
Great Britain	86,404	79,493	1,829	707
Italy	123,714	84,400	80,780	1,254
France	10,280	53,888	36	665
Russia	41,885	56,621	1,172	570
Austria	11,745	11,534	2,530	2,320
Germany	4,416	168	..	..
Switzerland	6,838	84	..	..
Greece	2,470	628	..	..
America	26,696	..	3,040	3,659
Turkey	..	26	2,803	105
Norway	..	..	2,120	1,543
Holland	..	1,928	..	..
Belgium	2,704	..	..	..
Spain	479	..	..	..
Other countries ..	8,623	..	6,160	..
Total	326,204	238,770	100,470	10,823

It is not possible to give positive statistics of the wine which is forwarded from the Gallipoli district by rail. Wine by rail.

During the recent vintage large numbers of buyers from all parts of central and northern Italy were here and purchased heavily both grapes and wine, which were forwarded by rail from the various stations of the Lecce Peninsula, the trains being made up and despatched from the Brindisi railway station.

Figs have not yielded as in previous years—this owing to the Figs. quality being inferior.

In public works nothing of any importance has been done. Public works.

TARANTO.

Mr. Vice-Consul Alberti reports as follows regarding the mercantile movement of the Port of Taranto during 1889 :—

Maritime
movements.

ENTERED.

	Sailing Vessels.	From—	Steamers.	Total.	Crews.	Tonnage.
	194	Coastwise...	114	308	5,207	124,772
	16	Foreign ..	1	17	173	3,019
1889	210	...	115	325	5,385	127,791
1888	232	...	125	357	6,275	194,882
Falling-off	22	...	10	32	890	67,061

CLEARED.

	Sailing Vessels.	To—	Steamers.	Total.	Crews.	Tonnage.
	177	Coastwise...	112	289	5,050	117,803
	33	Foreign ...	3	36	335	9,988
1889	210	...	115	325	5,385	127,791
1888	232	...	125	357	6,275	194,852
Falling-off	22	...	10	32	890	67,061

The above may be sub-divided as follows:—

ARRIVED AND SAILED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	3	2,672	3	2,672
Italian	193	15,245	108	102,890	301	118,135
German	...	...	2	1,797	2	1,797
Danish	...	...	2	1,797	2	1,797
Greek	10	1,962	...	...	10	1,962
Austrian	7	1,428	...	...	7	1,428
Total for 1889...	210	18,635	115	106,156	325	127,791

During 1889 the following goods arrived, viz.:—

	Number.	Cargo.
		Tons.
Sailing vessels	210	21,988
Steamers	115	9,035
Total	325	31,023

whilst the following were embarked here:—

	Number.	Cargo.
		Tons.
Sailing vessels	210	9,742
Steamers	115	4,603
Total	325	14,345

giving a total of exports and imports of 45,368 tons.

Trade
coastwise.

	Brought.	Loaded.
	Tons.	Tons.
Sailing vessels	19,421	9,476
Steamers	8,222	4,603
Total	27,643	14,079

composed of goods:—

IMPORTED.						Tons.
Sugar	..	..	..	..	..	394
Cottons	..	..	..	..	..	140
Timber	..	..	..	..	..	427
Iron	..	..	..	..	..	1,233
Building materials	..	..	..	..	..	11,503
Marble	..	..	..	..	..	130
Coal	..	..	..	..	..	4,515
Sulphur	..	..	..	..	..	212
Earthenware	..	..	..	..	..	598
Various	..	..	..	..	..	8,491
Total						27,643
EXPORTED.						Tons.
Olive oil.. ..	..	..	..	..	..	3,395
Iron	..	..	..	..	..	3,298
Breadstuff	..	..	..	..	..	5,786
Sundries.. ..	..	..	..	..	..	1,600
Total						14,079

The imports of iron building materials, marble, and coal, as also the iron exported, are connected with the arsenal works.

The foreign carrying trade is susceptible of the following division:—

Foreign trade.

				Brought.	Took away.
				Tons.	Tons.
Sailing vessels	..	..	..	2,567	266
Steamers	..	..	..	813	..
Total				3,380	266

Consisting of goods:—

IMPORTED.						Tons.
Mineral oils	..	..	..	..	..	1,088
Coffee	..	..	..	..	..	80
Coal	..	..	..	..	..	763
Timber	..	..	..	..	..	1,338
Various	..	..	..	..	..	111
Total						3,380
EXPORTED.						Tons.
Olive oil.. ..	..	..	..	..	..	160
Breadstuff	..	..	..	..	..	100
Sundries	..	..	..	..	..	6
Total						266

The importance of Taranto as a commercial and industrial centre is but small at present, but susceptible of considerable development as the works connected with the construction of the naval arsenal and the fortifications for its protection advance.

Commercial importance small, but increasing

Increase of population. Imminent immigration of skilled labour for arsenal. Municipality borrowing to build houses for arsenal hands.

A considerable increase of population is anticipated during 1890 and the following years, when the artificers for the arsenal and their families commence arriving. The Municipality of Taranto has contracted with the Italian Government to provide house accommodation for this new element of population, and are now borrowing, as a town loan, some 120,000*l.* to be spent in the construction of dwellings suited to the means of the various grades of skilled artizans, who will take up their abode in Taranto. The projected buildings are to be in blocks with all modern sanitary appliances, baths, laundries, schools, &c., the Government paying an annual subvention for twenty years for room space.

The necessity for this importation of skilled and technical labour is owing to the fact that in this district the labour is purely agricultural, of the lowest and most uneducated class; but without doubt the arrival of numbers of skilled artizans, labourers, seamen, and soldiery from other parts of Italy, will have a beneficial effect on the status of the local peasantry, at present simply hedgers and ditchers.

Commercial port, quays.

Various endeavours have been made to come to an arrangement with the Central Government, for the formation of a commercial port with quays, but so far without success, and vessels loading and discharging cargo have to do so in the open sea using lighters. The exposed form of the port renders such operations difficult, except in moderate weather.

AGRICULTURE.

First report. Lecce, seventh largest Italian province.

This being the first report under this head furnished by this Consulate, I may premise by stating that the Province of Lecce is the seventh largest province of the Kingdom of Italy; it is the southern part of the Apuglia of the ancients, and situated between 30° 47' 30" and 40° 48' 50" of latitude, and 16° 40' and 18° 40' longitude, east of Greenwich, with a territorial area of—

Quality of land.

Quality of Land.					Hectares.
Hilly land	..	..	..	..	118,085
Undulating land	..	..	..	..	309,429
Plain	..	..	..	..	425,511
Total	..	..	..	..	852,975

equal to about 2,107,872 acres, the greater portion of the whole of which is under cultivation.

Boundaries

The province confines on the north with Bari, and on the north-east with the Basilicata; on the east it is washed by the Adriatic, and on the west by the Ionian, terminating at its southern extremity at Cape St. Maria di Leuca, the dividing point between those seas.

It is divided administratively into Circondarii as follows :—

Administra-
tive divisions.

Place.	Population.
Lecce (county town) division ..	142,879
Brindisi	123,673
Gallipoli	134,331
Taranto	162,941
The whole province containing ..	553,724

giving a mean of 70 inhabitants to the kilom., or 227 to the square mile. I may here state incidentally that emigration is to all intents and purposes unknown in this province, an exceptional feature as regards population in Italy.

No forests exist in the province, and the proportion of land which is timbered is but small, and diminishing year by year as proprietors continue the extension of vineyards.

No mines exist; but there are numerous quarries of hard and soft stone, eminently suited for building purposes.

To June 30, 1886, date of the last return of the Ministry of Public Works, 838 kiloms. of provincial, and 735 kiloms. of communal roads were in operation, and 173 kiloms. were in construction—1,746 kiloms. in all; but since that date, in consequence of the construction of the railway line from Taranto to Brindisi, a number of new roads have been constructed, besides those which have come into existence through the increase in extent of land under vine cultivation.

The province is sufficiently furnished with railways; but additional lines are projected. Those now in operation are 331 kiloms. in length, with 42 stations.

A branch line starts from Gallipoli, and another from Maglie, meeting at Zollino, where the main line commences, continuing to Brindisi, where it divides; the main line of the Meridionali line continuing northwards to Bari and Bologna, where it joins the various services for Austria, Germany, Switzerland and France.

The Mediterraneo line (of which Brindisi is the terminal station) on the other hand takes a westerly direction to Taranto, whence a branch line proceeds eastward to join the Meridionali at Bari, the main line continuing in an eastward and north-eastward direction, through Calabria, by Potenza to Salerno, and thence northwards to Naples, Rome, and Genoa, where it joins the general European system.

This line at Metaponte connects with the line to Cosenza and Calabria, and between Potenza and Salerno with the Southern Calabrian lines in operation and construction, as also the system of railway lines now nearly terminated, which run down the centre of the entire peninsula. By these means Brindisi is the terminal point of a number of alternate railway lines with all parts, so that should the railway viâ Bari and Bologna for any cause be interrupted, the western route by Taranto, Salerno, of three inde-

pendent rail- Naples, Rome, and Genoa is available, or the alternate central Italy
way systems route—Taranto, Potenza, Melfi, Isernia, Solmona, Terni, Florence,
or routes from Bologna—now nearly completed.
the north.

Meteoro- The following is a brief meteorological abstract regarding the
logical. province for the 10 years 1876-86.

Temperature.
Rainfall.
Hail.

Months.	Temperature.	Rainfall.	Hail.
	Centigrades.	Millimetres.	No. of Days.
January	9.0	62.0	0.3
February	9.9	43.0	0.4
March	11.2	50.8	1.9
April	14.7	51.2	1.0
May	18.2	36.4	0.6
June	22.5	22.7	0.6
July	25.2	12.8	0.1
August	25.3	20.2	0.3
September	22.4	49.9	0.1
October	18.2	85.6	0.1
November	13.5	84.9	0.3
December	10.5	74.9	0.4
Mean of Year ..	16.7	Total 594.04	Total 6.1

That is to say, the highest temperature in the shade during the year was $77\frac{1}{2}^{\circ}$ fahr.; the lowest $48\frac{1}{2}^{\circ}$ fahr.; the mean of the year 62° fahr.

The heaviest rainfall was $3\frac{4}{10}$ inches for the month, the lowest $\frac{1}{10}$ ths of an inch, the total rainfall having been about $23\frac{1}{2}$ inches during the year.

Hail has fallen $6\frac{1}{10}$ days during the year, varying between $\frac{1}{10}$ th of a day during July and September to $1\frac{9}{10}$ ths of a day during March.

Agricultural The province is entirely agricultural, the principal productions
produce. being oil, wine and figs. The estimated produce of 1888 was as follows :—

Olive oil	49,031 tons
Wine	*86,774 "
Figs	12,600 "
Oats	62,180 "
Grain	50,000 "
Barley	16,000 "
Vegetables	10,000 "
Indian corn	1,400 "
Linseed	1,800 "
Potatoes	4,000 "
Oranges, lemons	50 million fruit
Tobacco	1½ million plants.

Olive oil. The most important product is olive oil. From 1876 to 1880 some 100,000 hectares were devoted to olive trees. In 1883 it reached 142,840 hectares, the sixth of the area of the province. This increase in land has not given a corresponding increase in

* Consisting of 1,000 litres, or 225 gallons.

the yield of oil, and in some parts of the province, Gallipoli for instance, landowners have uprooted olive trees to plant vines.

The vine cultivation has nearly quadrupled since 1874, and each year large districts come into production, whilst as the plants age the wine improves in quality, and increases in alcoholic strength.

The wine varies between 12° and 16° of spirit, according to age of plants, &c. The system of cultivation is improving, but the process of vinting practised needs improvement. An association of producers to create and maintain types as to alcoholic gradation, colour, and flavour for exportation is much needed.

The Italian Government last year, to encourage the exportation of wine to foreign countries, instituted a system of drawbacks, returning 8 c. per hectolitre per degree of spirit on all wine gauging over 11°.

A group of Milanese merchants commenced despatching large shipments of wine from Brindisi and Gallipoli to South America, packing the wine in casks imitated from the French Bordelaise, the Government bounty on these shipments leaving a fair margin on the transactions.

Government has now increased the minimum for drawback from 11° to 15°, and it becomes doubtful whether wine from this province, alcoholically strong though it be, will be able to compete with Bordeaux productions in foreign countries.

The question of finding a market for the enormous wine produce of this district is an extremely serious one. The two past vintages have demonstrated that France has supplied its requirements independently of Italy, and should Northern Italy have only a middling crop this year, which may be calculated on after two such bad years as those provinces have experienced in 1887 and 1888, the vintners will not require to supplement their own wines with those of Southern Italy to the extent they have been compelled to do in the past, and shut out of the French market by the existing tariffs, the producers of this and neighbouring provinces have an anxious prospect before them, particularly as it is estimated that the 1890 vintage will produce close on 100,000 tons, for a large portion of which a market has still to be found.

Alcoholic strength varies 12° to 16°.

Association for creation of types needed.

Drawbacks to encourage exportation.

Future markets for the wine crops.

Statistics of
all wine
exported in
1889-88.

The following is a comparison of the wine exported from the Province of Lecce during the years 1889-88:—

				1889.		1888.	
				Quantity.	Value.	Quantity.	Value.
				Tons.	£	Tons.	£
Brindisi ..	..	Railway ..	..	29,000	232,000	25,000	150,000
" ..	..	Sea ..	..	13,000	104,000	9,000	54,000
Total ..	..			42,000	336,000	34,000	204,000
Gallipoli ..	..	Sea ..	..	9,408	112,149	11,808	83,615
Taranto ..	..	Sea ..	..	Nil.	..	Nil.	..
" ..	..	Railway ..	..	?	?	?	?
Total ..	..			51,408	448,149	45,808	287,615

The Vice-Consul at Taranto was unable to obtain the figures from the railway of the wine trains made up at that station during the year, which renders this return incomplete. The collective exports of Brindisi show an increase of 8,000 tons and 122,000*l.* value, whilst Gallipoli shipments give a falling-off of 2,400 tons, but an increase of 38,534*l.* in value—together an increase of 5,400 tons and 160,534*l.* in value.

Dried figs.

Dried figs have become one of the staple products of this part of Italy. The quality is inferior to the Smyrna figs, and producers do not attend carefully to the packing of the fruit. The finer sorts are sent to North Italy and South Germany for eating purposes, the commoner sorts being exported principally to Trieste for Austrian distillery use, and chicory and coffee mixtures.

Tobacco.

Tobacco, formerly a considerable and valuable article of cultivation, has much fallen off in importance.

In 1885 8,000,000 plants were raised, in 1887 2,730,000, whilst in 1888 the total had fallen to 1,360,000. One of the Members of Parliament for the Province of Lecce, on June 22, 1889, in an important speech to the Chamber of Deputies, drew attention to the difficulties attendant on tobacco cultivation, and made suggestions which so far have produced no results.

Snuff.

The tobacco produced in the Province of Lecce was peculiarly suitable for snuff, in fact Lecce snuff, known as "Leccese," has long been favourably known to snuff takers, not in Italy alone, but all over Europe, and it is to be regretted that the production of a commodity so generally appreciated should be fast dwindling away.

Bee culture.

Bee culture is not a common industry in this province, there being but 7,354 hives known, which is to be regretted as the honey produced is excellent in quality.

Live stock.

With regard to live stock in its relation to agriculture, it has been observed that the planting of vines on land formerly tilled for grain, has had for effect that horses and mules have very con-

siderably increased in numbers, whilst oxen have much diminished; horses having increased in 10 years from 10,832 to 17,298, and oxen decreased from 37,858 to 29,485, and this, notwithstanding the increased consumption of meat as an article of diet, owing to the improvement in the standard of life of all classes.

Dairy products are not sufficient for the consumption of the province, not exceeding 1,500 tons annually. Wool in 1888 produced only about 310 tons.

The annexed table gives animals existing in the province at December 31, 1889:—

Administrative Division of Province.	Number of Animals.						
	Labour.			Food.			
	Horses.	Mules.	Asses.	Oxen.	Sheep.	Goats.	Pigs.
Brindisi	3,578	2,344	4,493	5,541	48,834	10,696	1,417
Gallipoli... ..	3,224	2,917	5,294	8,668	43,435	10,897	2,500
Lecce	3,616	2,196	4,974	4,538	49,439	8,273	1,210
Taranto	6,980	2,925	6,090	10,738	66,801	21,772	4,425
Province	17,298*	10,882*	20,851*	29,485†	207,509†	51,637†	9,552†

* Beasts of burden 48,531

† Beasts for slaughter 298,183

Total 346,714

The trade between the Province of Lecce and foreign countries during 1888 was:—

IMPORTED.						Tons.
Mineral oils	..	..	..	..	..	1,651
Coffee	..	..	..	..	..	172
Timber	..	..	..	..	..	3,665
Coal	..	..	..	..	..	73,661
Dried fish	..	..	..	..	..	152
Manure	..	..	..	..	..	700
Value	..	..	..	..	..	£186,369

EXPORTED.						Tons.
Wine	..	..	..	..	..	6,798
Oil	..	..	..	..	..	7,402
Figs	..	..	..	..	..	6,417
Value	..	..	..	..	..	£464,852

						£
Total value of all exports	..	..	..	..	..	597,612
„ „ imports	..	..	..	..	..	234,000
Excess of exports over imports	..	..	..	..	..	363,612

To which must be added the whole of merchandise exported from the province to Italy—an extremely heavy figure, unfortunately not at present ascertainable.

Increase in
equine and
decrease in
bovine.

Dairy
produce.
Wool.

Statistics of
animals at
December
31, 1889.

Total imports
and exports
with foreign
countries,
1888.

Credit.	The landed property of this province, though to a great extent owned by large proprietors—near towns and villages—is divided up into very small holdings. As an instance, the land around Brindisi is owned by several thousand small proprietors—many of the labouring class—who cultivate their plot of land or vineyard, and when not thus employed, work as day-labourers on the shipping or for other landowners.
Small landowners.	
Common difficulty, lack of capital.	One common difficulty, with but a few isolated exceptions, affects all proprietors—lack of capital.
Banking.	Unfortunately the statistics of banking operations, during 1889, are not yet published; but during 1888 the National Bank and the Banco di Napoli, through their branches and agencies, made advances to the extent of 2,726,000 <i>l.</i> to this province, which was less than advances made in previous years, and less in proportion to the adjoining wine producing provinces of Bari and Foggia; much discontent was expressed in commercial circles thereat, as money was extremely scarce.
Local co-operative banks.	There are but 13 local or co-operative banks in the province, and small proprietors unable to obtain advances from the agencies of the large banks, and having no co-operative bank to assist them, had to resort to usurers to obtain funds to cultivate their vineyards in view of the vintage.
Usury.	In the published statistics of the chamber of commerce for the province of Lecce for the year 1888, some most astounding figures are given under this head. How the chamber has obtained the information I am unable to say; but the surprising feature is that after paying the land tax of $40\frac{3}{10}$ per cent. on the assessed value of the land, the owner has been able to pay such rates of interest as those quoted below (as he must have done or sacrificed his property). Such being the case, it can only result that had these unfortunate proprietors been able to get money on fairly easy terms, say 8 to 10 per cent. per annum, they would have found agriculture, in this province, a very profitable speculation.
If proprietors can pay land tax and usurer's interest, agriculture on a fair basis should be remunerative.	At first sight it would seem that such a state of things might be worthy of the attention of foreign bankers; if proprietors can and do pay such rates of interest, surely legitimate banking business would prosper here!
Good business for legitimate banking firms.	
Extraordinary statistics as to usury.	The communes cited are in out-of-the-way positions, far from the larger towns, which, in some measure, explains matters.

RATES OF INTEREST PER ANNUM.

Commune.					Per Cent.
Mottola	..	..	..	..	40
Taurisano	..	..	..	..	40
Aradeo	..	..	..	..	50
Sternatia	..	..	..	..	60
Tricase	..	..	..	..	60
Latiano	..	..	..	..	60
Manduria	..	..	..	..	60
Palagiano	..	..	..	..	60
Soletto ..	..	..	..	..	72
Alliste ..	..	..	..	..	100
St. Pancrazio ..	..	..	..	..	100
Copertino	..	..	..	..	120
Guagnano	..	..	..	..	120
Oria ..	..	..	..	..	120
Racale ..	..	..	..	..	150
Galatone	..	..	..	..	160
Taviano	..	..	..	..	200
Salve ..	..	..	..	..	240
Massafra	..	..	..	..	240
Galatina	..	..	..	..	240
Sava ..	..	..	..	..	250
Casarano	..	..	..	..	250
Alezio ..	..	..	..	..	300
Erchie ..	..	..	..	..	300
Corigliano	..	..	..	..	400
Carpignano	..	..	..	..	480
Specchiaprete ..	..	..	..	..	550
Presicce	..	..	..	..	1,200

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ITALY.

REPORTS FOR THE YEAR 1889
ON THE
TRADE AND AGRICULTURE OF CAGLIARI.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 586.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1890.*

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ITALY.

CAGLIARI.

Consul Pernis to the Marquis of Salisbury.

My Lord,

Cagliari, May 23, 1890.

I HAVE the honour to transmit (herewith enclosed) to your Lordship my Report upon the Trade and Commerce of the Province of Cagliari for the year 1889.

I have, &c.
(Signed) E. PERNIS.

Report on the Trade and Commerce of the Province of Cagliari for the Year 1889.

In my other report addressed to your Lordship, under date of yesterday, I spoke chiefly of agricultural and similar industries; in the present I shall confine myself more particularly to the mining, salt, and tunny fishing industries, with a glance at the imports, exports, and general navigation movement of the various ports in the province of Cagliari, regretting to be unable to do as much for the northern province of this island, the Vice-Consul at Sassari having failed to obtain the necessary data.

As shown in the annexed table A. the mines worked during the year 1888-89 were 86, their total output was 144,882 tons for the value of 666,849*l.*, showing an increase over the preceding campaign of 11,255 tons and an increased cash value of 41,475*l.* This increase was composed as follows: 1,759 tons of lead ores, 7,777 tons of zinc ores (chiefly calamine), and 2,518 tons of lignites.

The number of persons employed in the working of the mines was 10,260, of which 9,323 were males and 937 females.

In the underground works there were employed 4,960 miners, and at surface 5,300 labourers.

The smelt mills of Fontana-Mare and Masua produced 946 tons of pig lead, valued at 19,163*l.*, employing 80 workmen.

The smelt mills of Su Suergiu, in the district of Villasalto (which takes its name from the adjoining mine) produced 29 tons (925)

Smelting
works.

of melted sulphuret and 2 tons of oxide of antimony, for the value of 636*l.*, employing 10 workmen.

Salt works.

It can be calculated that 148,000 tons of salt have been produced last year at these works in Sardinia, amounting in value to 44,440*l.*; of this quantity 60,000 tons were consigned to Government for home consumption, and about 32,161 tons were exported to Africa, America, Russia, Sweden and Norway. This shows that the supply of salt is not only sufficient for Italy, but is also one of the principal exports from this island, and a source of great revenue to the State, to whom the salt is delivered free at Genoa, Spezia, Savona, and Sanpiero darena, at the price of 5*s.* 2½*d.* per ton of 1,000 kilos. (2,206 lb. avdps.), and by whom it is sold at 18*l.* per ton.

Fisheries.

The result of the tunny fisheries, situated in the south-west coast of this island, in the neighbourhood of Carloforte, St. Antioco, and Oristano, was, in 1889, much better than in 1888; in the latter year only 993 tons were put up under oil and shipped to Leghorn, Genoa, and Alassio, in the former year 1,191 tons were shipped to the same ports, amounting in value to 64,352*l.* It is, however, the opinion of practical men that this industry cannot be remunerative until the question of the duty upon the tunny fish imported in Italy from Spain is not resolved.

Foreign commerce.

The annexed table B. shows, by categories of goods, the importance of the imports for the year 1889, amounting to 253,785*l.* This increase must be attributed to a larger importation in 1889 of colonials, colours, dyes, tan, hemp, jute, and other fibrous vegetables, wood, and grain.

The annexed table C. will also show the importance of the exports for 1889, which reached a total value of 585,641*l.*, an increase over 1888 of 77,695*l.*; this increase was caused by a larger exportation of wines, minerals, cattle, and hides.

Trade with Great Britain and colonies.

The tables D. and E. annexed to this report show the importance of trade between this province and Great Britain. Table D. shows that 33,946 tons of goods were imported from England in 1889, valued at 35,551*l.*; and the export to Great Britain and the island of Malta amounted to 499 tons, valued at 6,843*l.* The details contained in both tables show the quality of goods most in demand between the province of Cagliari and Great Britain.

Coasting trade.

The coasting trade between this province, the continent and island of Sicily, is worthy of notice. The value of the goods imported reached the sum of 920,000*l.*, and the exports 880,000*l.* The ports most in communication with Cagliari are Genoa, Naples, Leghorn, Savona, Pertusola, Palermo, Trapani, and Messina.

Total commercial movement.

The total commercial movement from the province of Cagliari may be stated as follows:—

	£				
Coasting trade	..	..	..	..	1,800,000
International	..	..	..	..	800,000
Total	..	..	..	..	2,600,000

It is well known that all industries are greatly impeded by the

heavy taxes levied by the Government, the province, and the communes, and by the vexatious system used in collecting them. Had trade and liberty of action not been continually hampered as it is in every single manifestation by fiscal agency, this island would soon denote a great increase of its productive powers; but, unfortunately, the requirements of the public treasury are on the increase, and commerce has to struggle as best it can against this difficulty of heavy taxation and consequent bureaucratic fiscality.

The present Minister for Public Works has recognised the necessity of constructing a breakwater on the west side of the new ^{Harbour} works. port, and has provided for such work in his budget for last year, and it is expected soon to see the work undertaken. It is the general opinion that this breakwater will prevent the silting up of the harbour by the sand, rubbish, and sea-weed now carried into it by the west and north winds from the opposite shore and the adjoining lake.

The international shipping movement for the province of ^{Navigation.} Cagliari with sailing vessels and steamers during last year, as shown in tables F. and G. annexed to the present report, was in arrival of 568 ships of the total tonnage of 159,897, viz., 449 sailing vessels for 66,823 tons, and 119 steamers for 93,074 tons.

In departure were 375 sailing vessels for 73,054 tons, and 126 steamers for 118,779 tons.

In total between arrivals and departures were 824 sailing vessels for 139,877 tons, and 245 steamers for 211,853.

Table A.—MINERAL Production of the Mines of the Island of Sardinia during the Year 1888-89.

Ores.	Mines at work.	Production.		Workmen.				Motors.			
		Quantity.	Value. £	Males.		Females.		Hydraulic.		By Steam.	
				Adults.	Under 15 years.	Adults.	Under 15 years.	Number.	Horse- power.	Number.	Horse- power.
Lead ..	..	Tons. 85,585	269,629	8,198	599	631	261	6	125	78	1,854
Zinc ..	75	85,922	315,875								
Argentiferous	..	1,997	69,946	15	..	..	..	..	..	..	..
Manganese ..	2	1,641	1,378	167	..	45	..	..	..	..	..
Antimony ..	3	73	1,190	342	2	..	..	..	..	2	25
Lignite ..	6	19,664	8,831								
Total ..	86	144,882	666,849	8,722	601	676	261	6	125	80	1,879

B.—COMPARATIVE Table of Imports at the various Ports of the Province of Cagliari in the Years 1888–89.

Categories.	Articles.	Imports.	
		1888.	1889.
		£	£
I.	Spirits, beverages, and oils	14,285	9,540
II.	Colonials, drugs, and tobacco	29,760	36,260
III.	Chemicals, medicinals, resins, and perfumery	968	443
IV.	Colours, paints, and dyes	218	434
V.	Hemp, flax, jute, and other fibrous grasses except cotton	1,005	1,685
VI.	Cotton	3,927	3,819
VII.	Wool and hair	5,170	2,556
VIII.	Silk	1,006	707
IX.	Timber and straw	16,227	18,549
X.	Paper and books	116	517
XI.	Hides and furriery	4,231	3,751
XII.	Metals, manufactures of, and minerals	26,494	17,269
XIII.	Stones, earthenware, and glass	36,205	34,321
XIV.	Cereals, flour, &c.	93,328	114,283
XV.	Live animals and animal produce	6,193	7,755
XVI.	Sundries	1,876	1,891
XVII.	Precious metals	419	5
	Total	241,423	253,785

C.—COMPARATIVE Table of Exports at the Various Ports of the Province of Cagliari in the Years 1888–89.

Categories.	Articles.	Exports.	
		1888.	1889.
		£	£
I.	Spirits, beverages, and oils	9,446	17,027
II.	Colonials, drugs, and tobacco	68	88
III.	Chemicals, medicinals, resins, and perfumery	12,578	14,161
IV.	Colours, paints, and dyes	36	2
V.	Hemp, flax, jute, and other fibrous grasses except cotton	218	59
VI.	Cotton	15	..
VII.	Wool and hair	647	309
VIII.	Silk	..	..
IX.	Timber and straw	..	57,045
X.	Paper and books	99,573	..
XI.	Hides and furriery	1	32,320
XII.	Metals, manufactures of, and minerals	24,773	440,513
XIII.	Stones, earthenware, and glass	335,523	612
XIV.	Cereals, flour, &c.	650	2,304
XV.	Live animals and animal produce	10,555	21,145
XVI.	Sundries	13,852	56
XVII.	Precious metals	6	..
	Total	507,946	585,641

D.—INTERNATIONAL Movement of the Goods Imported at Cagliari from Great Britain and British Colonies during the Year 1889.

Categories.	Description of Goods.	Quantity.	Value.	
			Currency.	Sterling.
		Cwts.	Francs.	£
I.	Fixed oils, beer in bottles, spirits in bottles, mineral oils refined in barrels	280	5,550	222
II.	Confectionery, tea biscuits, and tea ..	24	3,550	142
III.	Sulphate of copper, compound medicines not named, and gunpowders ..	94	3,500	140
IV.	Inks and varnishes	..	50	2
V.	Ropes, warp, and tissues (cotton and linen), &c.	142	23,128	925
VI.	Coloured or dyed tissues, printed or sewed	28	4,863	194
VII.	Woollen combed tissues.. ..	14	5,227	209
IX.	Wooden works, polished and unpolished frames, ships boats	12	540	22
X.	White or coloured paper in envelopes, printings, and lithographs, iron plates covered with zinc, tin, steel springs, cast iron in pigs, iron and steel in bars, wrought iron	4,790 ¹	33,400	1,336
XII.	Iron tools, copper and brass, machinery, optic and chemical instruments	240	18,028	722
XIII.	Stones for building, brickwork, coals, white earthenware, coloured and decorated earthenware, common bottles	672,960	780,964	31,238
XIV.	Salted and smoked fish.. ..	340	9,975	399
	Total	678,924	888,775	35,551

E.—INTERNATIONAL Movement of the Goods Exported at Cagliari to Great Britain and British Colonies during the Year 1889.

Categories.	Description of Goods.	Quantity.	Value.	
			Currency.	Sterling.
		Cwts.	Francs.	£
I.	Wine in casks (to England)	28	280	11
II.	„ bottles (to England)	2	135	5
XI.	Leather (to Malta)	2	387	16
XII.	Lead ore (to England)	7,400	87,220	3,439
XIV.	Grain	434	3,630	145
XV.	Cheese (to Malta)	2,118	79,425	3,177
	Total	9,980	171,077	6,843

CAGLIARI.

7

F.—RETURN of all Shipping at the Ports of the Province of Cagliari in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	8	3,778	51	39,920	59	43,698
Italian	396	46,893	60	44,873	456	91,666
French	6	1,498	...	...	6	1,498
Austro-Hungarian	8	2,058	1	1,249	9	3,307
Swedish and Norwegian	17	7,610	...	...	17	7,610
Russian	4	2,027	...	...	4	2,027
Dutch	...	...	2	1,947	2	1,947
Greek	7	2,235	...	...	7	2,235
Belgian	...	...	3	3,671	3	3,671
German	1	335	1	836	2	1,171
Danish	...	...	...	...	...	...
Spanish	...	...	...	...	...	...
Turkish	1	119	1	478	2	597
Montenegrin ...	1	270	...	...	1	270
Total	449	66,823	119	93,074	568	156,897

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	9	3,438	57	65,862	66	69,300
Italian	312	49,111	68	43,122	370	92,233
French	4	953	...	...	4	953
Austrian	13	5,013	1	1,249	14	6,262
Swedish and Norwegian	20	8,362	...	...	20	8,362
Russian	6	3,029	...	...	6	3,029
Dutch	...	...	6	4,975	6	4,975
Greek	7	2,343	...	...	7	2,343
Belgian	...	...	3	3,093	3	3,093
German	1	335	...	...	1	335
Spanish	1	223	...	...	1	223
Turkish	1	119	1	478	2	597
Danish	1	118	...	...	1	118
Total	375	73,054	126	118,779	501	191,833

Consul Pernis to the Marquis of Salisbury.

My Lord,

Cagliari, May 23, 1890.

I HAVE the honour to transmit (herewith enclosed) to your Lordship my Report upon the Agriculture of the Island of Sardinia for the year 1889.

I have, &c.

(Signed) E. PERNIS.

*Report on Agriculture in the Island of Sardinia for the Year 1889.*Wheat,
barley, &c.

The average crop of wheat in Sardinia is calculated to be about 584,630 imperial quarters, and that of barley, horse beans, and maize reached altogether 232,122 quarters. For the year 1889 the average production did not differ much from that of the previous year. It must be noted, however, that, owing to the construction and opening of some steam mills, some of which are used in grinding large quantities of Russian wheat, to which must be added the diminished demand for exportation to the Italian mainland of the hard grain of Sardinia, it follows that the cultivation of wheat in the island has sensibly decreased.

Farming.

Generally the cultivation of agricultural products is done by fallowing the soil, and the sowing, reaping, and thrashing are done by hand by the agriculturist; it is only in a few localities where the thrashing machines belonging to some rich proprietors are used, the compensation for their loan being given in so much product of the soil.

The use of agricultural implements and machinery is very limited in the island, the principal causes of it are the condition and unevenness of the soil, the fact that our farmers are not in a position to detract from their business any large sums in order to invest them in the purchase of machinery, and, lastly, the reluctance in the majority to follow a different system to that adopted by their ancestors.

Perhaps if agricultural machines were to be offered at reasonable prices, to be paid by monthly instalments, some of our intelligent farmers might be induced to buy them, and thus by their example spread the use of machinery all over the island.

Cheese and
dairy
products.

All kinds of dairy products are made by a very primitive process all over Sardinia, except in a few places in the districts of Cagliari, Iglesias, Oristano, and Ozieri. The quantity of cheese from sheep's, goat's, and cow's milk amounted to about 5,000 tons, whilst the curds and whey reached 800 tons. The average price of cheese has been about 32s. per cwt. for that of goat and sheep, and 4l. for the cow's; the price of curds and whey did not go over 16s. per cwt. The making of butter

has no great importance in the province of Cagliari, and it is only that of Sassari, and more particularly in the district of Ozieri, that the manufacture of butter assumes any importance, as the quantity made there yearly reaches about 150 tons, of which the greater quantity is exported to Rome, and a fair quantity is consumed in the island. During 1889, the exportation of cheese from the province of Cagliari amounted to 1,561 tons, which were forwarded to Naples, Sicily, Genoa, Leghorn, and Venice, whilst about 260 tons were sent to Tunis, France and Malta.

The diseases that predominate amongst cattle in Sardinia are epizootia and carbuncle; but, fortunately, very seldom these plagues assume any intensity or malicious nature as to cause uneasiness or alarm. From the figures furnished by the official reports it appears that cattle breeding, especially in the horned specie, received a considerable impulse during the last year, and that all our best and richest farmers are devoting their attention and cares to the breeding of cattle suitable for slaughter and the dairy, without, however, forgetting the improvement of the breed. It would be of great utility to the landlords and cattle breeders to have the help of scientific men to guide them in this important undertaking, therefore the need to have in every district a veterinary surgeon becomes evident, as has been done in various parts of the mainland, where cattle breeding has less importance than in this island. To attain this object some of the local corporations have forwarded petitions to the Government, but, unfortunately, up to the present no reply has been received.

The cattle exported in 1889 from the province of Cagliari amounted to—

Oxen	..	..	..	..	..	10,481
Bulls	..	..	..	..	..	3
Cows	..	..	..	..	..	3,538
Calves	..	..	..	..	..	1,311

The largest quantity was shipped to Sicily, the remainder was forwarded to Leghorn and Naples.

A similar quantity, if not larger, of horned cattle was exported from the province of Sassari to Civitavecchia and Rome.

These figures stand to demonstrate how plentiful horned cattle are in Sardinia, and how they are eagerly sought after by dealers owing to the low prices at which breeders sell them.

The swine exported amounted to 398 heads, all sent to Sicily. The continual cutting down of forests, which might be called a downright ruin and devastation, caused an immense damage to the breeding of swine. It is generally believed that, should the present system of destruction continue much longer, the time will come when, from want of proper food and scarcity of acorns, swine will disappear completely from Sardinia.

As we mentioned in a previous report the want of reeling and twisting mills, to which the silk cocoons might be sent or sold, is the principal reason for the slow progress of silkworm rearing.

this island. A few speculators who had undertaken the rearing of the worm gave it up in despair, as they could not find a market for the seed produced.

Besides, the fall in the prices of cocoons diminished the estimated returns of the breeders. The quantity of silk cocoons produced in 1889 is reckoned to have been about 7,436 lbs. avoirdupois, the price of which was on the average from 2s. 2d. to 2s. 5d. per kilo.; 1s. 2d. to 1s. 3d. per lbs. avoirdupois.

Wine and
spirits.

Very considerable is the quantity of wine produced in the island every year; it is supposed to amount to about 22,000,000 gallons.

Sardinian wines are now in great demand for the Italian continent and abroad, which demand is evidently proved by the enormous quantity of wine exported in casks last year. From the various shipping ports of the province of Cagliari were exported 3,235,470 imperial gallons of wine, of which 2,922,928 gallons went to Genoa, Leghorn, Spezia, Rome and Sicily; and 311,705 gallons were shipped to Tunis and France.

Owing to the constant demand the prices were 50 per cent. above those paid the preceding year; but did not go beyond the price of 8d. per gallon as an average.

The manufacture of "eau-de-vie" and spirits has been completely crushed by the fiscalities and odious measures adopted by the custom-house authorities and officials in order to collect the heavy taxes imposed on this branch of business.

The taxes for manufacturing imposed by Government and the present low prices do not leave any profit for the distiller.

Olive oil.

The production of olive oil is much more important in the province of Sassari than in that of Cagliari; we do not know whether it is a matter of question of method in the process of making the oil, or in the system of preserving it, or be it for want of proper outlets, but it is a positive fact that the exports are not very considerable and not proportionate to the abundance of the oil produced.

Honest speculators having sufficient capital to work with, and correspondents out of the island, might realise important profits by making, at the proper moment, ample purchases of oil, and selling it afterwards pure and unadulterated, without having recourse to mixtures and adulterations, which practices throw discredit on the dealer and on the country also.

Fruits and
vegetables.

There is a gradual increase in the cultivation of fruit and vegetables, especially in the districts that are sufficiently provided with water.

The product of oranges and lemons is far above the local demand, consequently an enterprising speculator would find in this branch of business a wide and fruitful field where to devote his energy and intelligence; the fruit might be exported to the Italian continent or abroad.

Almonds are very plentiful, and offer opportunity for profitable speculations; large quantities are bought by local merchants and dealers.

From information received from a reliable source it appears that the average exports of almonds (peeled or unshelled) is about 253 tons per annum from the province of Cagliari alone.

An unpleasant argument is that of the continual destruction Forests. of all the forests and woods in the island; to stop such destruction the existing laws have proved quite insufficient. Immense plains and vast ranges of hills and mountains, clad by a rich and luxuriant vegetation, have now been completely stripped of trees and verdure and reduced to a horrid state of desolation and bareness. The destructive system followed in cutting down woods and forests has nearly destroyed the sylvan richness and beauty of the country, causing a great damage to the business of cattle-breeding. It is the firm opinion of many persons that not many years hence the island of Sardinia will be reduced to a barren rock; and the waters that for many months run plentiful from the mountains to the valleys, finding no barriers to their course, will inundate the lowlands, causing heavy damages to agriculture, and putting in continual danger the lives of the inhabitants.

The yearly produce of the forests is valued at 280,000*l.*, of which more than 160,000*l.* are represented by the value of the charcoal forwarded to continental Italy and abroad, about 64,000*l.* for cork-bark used for tanning, oak-bark and cork-bark, to be worked for various business uses, the remaining 56,000*l.* represent the approximate price of timber and fire-wood obtained from the forest.

At the present moment, except the National Bank, which Banking es-
tablishments. does also transactions and grants loans on land mortgages and landed properties, no other bank or credit establishment does exist which could in any way assist the farmers and land proprietors. Nevertheless, even the help granted by the National Bank is considered insufficient for the general want, and such it will appear when we state that the sum total of loans granted in three years for the whole of the island amounted to only 124,300*l.*

Perhaps if it were possible to grant loans at a low rate of interest, say not above 5 per cent., also introduce easier methods for transacting the whole business, bring about a saving in the expenses charged to borrowers, then the help given to landed property would prove more beneficial, and would help the borrowers to pay off by gradual instalments their debts and be ready to meet the sad consequences of a bad crop, which in most cases are the causes of the fall and ruin of the agriculturist. When it is evidently proved that such unexpectedly calamitous events have really happened, then the bank that has lent money on mortgage should give time, or allow a delay for the re-imbursment of it, instead of taking immediate proceedings against the unlucky debtor, whose position becomes thus more embarrassed, till at last, to complete his ruin, the mortgaged property is put up for sale by private auction.

Fairs and markets, held on certain fixed dates of the year, are Fairs and
markets. not usual in Sardinia. Only from date immemorial are celebrated in many districts of the island some religious festivals, during

which the cattle breeders, manufacturers, ironmongers, and general dealers open a market for the sale of their wares and products.

In spite of the many facilities granted nowadays in the transport of goods, yet even these fêtes with their fairs and markets are gradually losing the importance they had in olden times.

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AND FINANCE.

ITALY.

REPORT FOR THE YEAR 1889
ON THE
TRADE OF PALERMO.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 576.

*Presented to both Houses of Parliament by Command of Her Majesty,
AUGUST, 1890.*

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ITALY.

PALERMO.

Consul Stigand to the Marquis of Salisbury.

My Lord, *Palermo, July 4, 1890.*

I HAVE the honour to transmit herewith my Report on the Trade and Commerce of Sicily for the year 1889.

I have, &c.

(Signed) WILLIAM STIGAND.

Report on the Trade and Commerce of Sicily for the Year 1889.

The returns for Palermo, and indeed for all Sicily, with the exception of Messina, although not denoting such a favourable condition of commerce as existed a few years ago, nevertheless show such a sign of improvement as lead commercial men to hope that the gloomy anticipations of last year will not be realised, and that the depression of trade was at the lowest point in 1888, and that we may now hope for improvement.

The improvement is, it is true, not remarkable in any particular direction; indeed, in some cases there is no improvement at all; but still it is something to find at least an arrest of the downward tendency.

In Palermo itself the whole commerce, or totals of exports and imports, still shows a falling-off of 143,928*l.*; but this is slight compared with the falling-off of 1,000,000*l.* of last year.

The exports increased, however, by 16,000*l.*, the falling-off being due to a decrease of imports.

SHIPPING.

The returns of shipping show a slight increase both in numbers and in tonnage, and both in sailing and in steam vessels, against the returns of 1888. The total number of sailing vessels was 1,984 with a tonnage of 93,585, as against the number of 1,859 and tonnage 90,787 in 1888; while the total number of

steam vessels of all nations was 1,676 with a tonnage of 1,132,461, as against the number of 1,542 with a tonnage of 1,085,602 for 1888.

To this slight increase Great Britain contributed also slightly, the number of British steam vessels having been 401 during the past year with a tonnage of 444,959, as against the number of 398 with a tonnage of 412,566 in 1888, being an increase of three vessels in number and of 32,393 tons. The number of sailers was the same (three), with a slight increase of tonnage.

There was a slight increase of Italian shipping, both in number and tonnage in 1889. The totals were for the year 1,956 sailing vessels and 1,195 steamers, of which, however, a large proportion are passenger-boats running regularly every day.

French steam vessels fell off from 10 to four in number. Germany furnished 32 steam vessels as against 33 in the previous year. After Germany, the Dutch furnish the greatest number of steam vessels, namely, 22, as against 28 in 1888. Then comes Belgium with 10 steamships against 11 in 1888; Greece, after Italy, as might be expected, furnished the greatest number of sailing vessels, 11, and one steamer; Norway sent eight steamers; Denmark, two; Spain none, but two sailing vessels; Austria sent six sailing vessels and no steamers. It thus appears that, in comparison with the shipping of Great Britain and Italy, that of all other nations is insignificant, and by far the greater part of the foreign trade of the port is performed by British ships; the greater portion of the Italian shipping being, as above noted, occupied in the passenger and in the coasting trade.

New steam-
ship line
between
Palermo and
London.

The want of direct and regular communication between Palermo and London has long been felt here, and, after much discussion, a company of Italian and English shareholders has lately been formed with the object of opening a line of fast steamers to connect Naples, Palermo and London for the export of Sicilian and Neapolitan produce, and the import of English goods, manufactures, and commodities generally, and also to carry passengers. Besides the capital subscribed by the shareholders the banks of Sicily and of Naples will grant subsidies.

There are to be three departures monthly from Naples with an interval of ten days. The steamers call at Palermo the day following their departure from Naples, and reach London ten days later. On their return journey they are to have liberty to call at Spanish and North Italian ports. The first steamer is expected to leave on August 1.

Coasting
trade.

With respect to the coasting trade, besides the returns of exports and imports to and from foreign countries referred to in this report, I have lately, and for the first time, been supplied with returns of the *cabotaggio* (coasting trade) for the province of Palermo for 1887 and 1888.

They show that a very considerable trade is carried on between this and other ports and places in Sicily and in Italy, chiefly in Italian steamers and small sailing craft, but also partly in foreign ships; of which, of course, British vessels form a great proportion.

The exports and imports by the coasting trade have to do only with the internal exchange of commodities in Italy. In every country the returns of exports and imports from foreign countries must be but a partial indication of the whole trade of the country.

The figures relating to the coasting trade are recorded at the "Intendenza di Finanza," while those of exports and imports to and from foreign countries are kept at the custom-house.

I have no means of knowing yet what are the figures for 1889, but in 1887-88 they were:—

				Year.	Value.
					Lire.
Exports	..	..	..	1887	25,641,571
Imports	..	..	..	"	70,334,114
Exports	..	..	..	1888	22,970,755
Imports	..	..	..	"	85,484,165

Or in English equivalents:—

				Year.	Value.
					£
Exports	..	..	..	1887	1,025,703
"	..	..	..	1888	918,910
Imports	..	..	..	1887	2,813,364
"	..	..	..	1888	3,429,366

From these figures it would appear that the returns of the custom-house at Palermo do not enable one to estimate the amount of the whole commerce of Palermo, and its adjoining district. The imports by *cabotaggio* (coasting trade) being largely in excess of the imports directly imported from foreign countries, as shown by the following figures:—

			Year.	Value.
				£
Imports from foreign countries			1887	1,439,876
" by coasting trade	..		"	2,813,364
" from foreign countries			1888	892,216
" by coasting trade	..		"	3,429,366

The exports by *cabotaggio*, as compared with the exports to foreign countries, do not show such a great difference, which is but natural since the articles of export by *cabotaggio* must be chiefly of Sicilian origin and for Italian use, while those of import are both foreign and Italian, the figures, however, are as follows:—

	Year.	Value.
		£
Exports to foreign countries ..	1887	1,708,670
" by coasting trade ..	"	1,025,703
" to foreign countries ..	1888	1,326,770
" by coasting trade ..	"	918,910

EXPORTS.

General
remarks.

The whole value of the exports from Palermo in 1889 amounted to 1,342,891*l.*, as against 1,326,770*l.* in 1888, presenting, as has been noted, an increase of 16,121*l.*

There has been a considerable increase of exports to Great Britain, amounting in value to 23,572*l.*, but there was again, as anticipated, a considerable falling-off of exports to France, the figures being 159,774*l.* for 1889 and 215,486*l.* for 1888, representing a falling-off of 55,712*l.* This was made up by an increase of exports to the United States, Austria, Holland and Belgium, and other countries, while the exports to Turkey and Russia were diminished by one-half.

The chief countries for exports are the United States, which takes 581,637*l.* worth of exports Great Britain taking only 372,124*l.*; but then Great Britain imported into Palermo in 1889 327,208*l.* worth of goods, and the United States 58,948*l.* worth. As might be expected, all the carrying trade to the United States is done by British vessels; the Italian vessels going from Palermo to the United States being about one or two a month; from other nations, nil.

Fruit

Of these exports, that of green and dry fruit has increased from 590,795*l.* to 625,162*l.* during the past year, namely an increase of 34,367*l.* The figure attained in 1889 being slightly in excess of the average figures of the preceding years, but there was a notable excess in the quantity exported to the United States, as the following table shows:—

SHIPMENT of Green Fruit, in boxes, to the United States, 1887-88.

Month.	New York.		Boston.		Philadelphia.		New Orleans.		Baltimore.		Total.	
	Oranges.	Lemons.	Oranges.	Lemons.	Oranges.	Lemons.	Oranges.	Lemons.	Oranges.	Lemons.	Oranges.	Lemons.
October, 1888 ..	454	6,771	9,784	9,040	..	4,228	..	4,982	..	..	484	11,763
November, " ..	7,654	23,994	28,071	19,429	10,197	7,965	..	16,772	..	..	18,942	54,034
December, " ..	40,846	45,104	11,853	11,443	6,498	8,244	..	36,683	..	..	84,449	109,181
January, 1889 ..	38,360	47,665	11,853	11,443	6,498	8,244	..	43,022	..	5,873	77,614	116,262
February, " ..	38,693	51,082	34,689	24,792	14,703	16,003	..	4,114	..	1,621	93,051	100,864
March, " ..	36,076	61,776	29,821	31,971	10,202	17,558	..	5,936	..	..	82,035	160,988
April, " ..	39,315	124,115	20,063	38,273	5,271	28,219	..	49,633	..	..	66,501	236,949
May, " ..	41,792	143,871	19,760	59,578	5,691	20,646	..	41,342	..	..	67,831	237,213
June, " ..	5,266	131,804	4,102	26,984	1,603	29,711	..	63,118	..	..	11,257	236,480
July, " ..	1,255	73,223	2,029	26,220	..	..	..	47,981	..	..	8,234	99,443
August, " ..	..	..	..	..	..	..	..	..	..	..	..	45,232
September, " ..	..	53,083	..	..	..	822	..	20,469	..	..	..	74,374
Total ..	249,741	807,770	160,067	247,735	55,035	123,396	85,123	331,368	5,477	7,494	505,443	1,522,763
" " for the preceding year..	231,695	851,551	109,076	200,792	56,242	121,653	18,065	322,033	5,592	11,956	420,700	1,507,985

PALERMO.

There was a disproportion between quantities and prices in 1889 due to the low prices generally obtained in the American markets. The Sicilian exporters have not yet quite learnt, as I have stated in previous reports, that it is only the good and sound fruit, properly and neatly packed, that fetches high prices; but with their innate "laissez faire" habits, they export all kinds of fruit, indifferently packed, and without regard to due lapses of time between the shipments. It is, however, satisfactory to note that a certain improvement is taking place in this, as is instanced by the occasional high prices reached by some of the shipments last summer.

Besides the 2,000,000 boxes of oranges and lemons (containing on an average 300 each) shipped to America, a little more than one-third of a million boxes went to Great Britain, of which:—

					Boxes.
Liverpool received	..	..	..	..	107,719
London	"	..	..	..	128,172
Hull	"	..	..	..	28,811

The remainder went to other English ports.

The shipments to Montreal likewise augmented by 6,012 boxes; the total for the year ending September, 1889, being 14,978 boxes.

Another good market for Palermo fruit is Holland, which took 50,000 boxes; then come Austria, France, Germany and Belgium, each taking from 16,000 to 7,000 boxes.

The prices of oranges in the country round Palermo have been rather high throughout the year: they ranged from 13 fr. to 31 fr. (10s. 2d. to 24s. 3d.) per 1,000; lemons from 10 fr. to 17 fr. (8s. to 13s.) per 1,000.

Sumach.

There was a large decrease in the export of this article—viz., 125,083*l.*—due to deficient crops caused by want of cultivation. The principal countries to which sumach is sent are Great Britain, France, the United States, and Germany; and the value sent to them in 1889, and in 1888 was:—

Country.				1889.	1888.
				£	£
Great Britain	..	..	..	127,640	156,983
France	..	..	..	75,484	138,894
United States	..	..	..	62,560	65,928
Germany	..	..	..	13,400	21,536

The prices at which the growers sold this produce varied throughout the year from 28 to 32 taris the cantara (old Sicilian rates) equal to 6s. to 6s. 10d. per cwt.

Lemon juice.

Has increased by 5,312*l.*, there having been an augmented demand from France and Great Britain, the only two principal markets for this product. France took 4,800*l.*, against 1,186*l.* in 1888. Great Britain raised her demand of 2,115*l.* in 1888, to 3,212*l.* in 1889.

This export has also increased, so far as the Port of Palermo is concerned, from 11,309*l.* in 1888, to 13,544*l.* in 1889, the quantities rising in greater proportions, thus showing that there has been a call at this port for cheap Sicilian wines. Having given separate reports on this article in the course of the last year, it is not necessary here to give greater details. The returns of exports, however, from Riposto and Messina show a falling-off, while those from Marsala show a considerable increase in quantity, though not so much in value.

The export trade in this produce for the last two years, so far as Palermo is concerned, is illustrated by the following figures:—

Country.	1888.	1889.
	£	£
Great Britain	489	489
France	776	4,733
America	5,401	2,607
Switzerland	2,774	4,234
Holland	1,340	320
Germany	190	213
Other countries	359	948
Total	11,309	13,544

The figures show a great falling-off, both in quantities, prices, Sulphur. and values, but this is simply a continuation of the depressed state of the sulphur market reported in previous years. Towards the end of 1889, and up to the time of writing this report, the trade has improved, several mines in Sicily being closed, as the "stocks" at the outports become gradually exhausted, prices rise.

IMPORTS.

It is a remarkable fact that while the exports have increased by 16,121*l.*, the imports have decreased by 160,049*l.* General remarks.

These are very remarkable figures, and the explanation of their strangeness is that the purchasing power of the country, in spite of the increase of export, has not been revived in proportion, and that it has not yet had time to rise to its former level. Thus the imports from Great Britain have fallen-off by 48,490*l.* The imports from France have, as was natural, fallen also. The imports from Germany have also fallen, and to a greater degree, and that is strange considering the pains that have been taken to push the German trade. They have fallen by 20,650*l.* Holland has also fallen largely by 14,000*l.* Turkey by nearly one-half (44,000*l.*), in consequence of the falling-off of the importation of cattle.

When the table of returns of the articles of import is examined it will be found that the opinion put forth above, that the purchasing power of the island has not had time to recover from the crippling influence of former years, is verified. For example, cotton goods form the chief foreign commodity of goods purchased by the labouring classes, and if their wages are not Cottons

satisfactory they can purchase no more cotton, and they go mending their rags; a good criterion of the state of the labour market may be formed by the quantity of discordant patches in the dresses of women and children. Now the sale of cotton goods has fallen-off by 48,326*l.*, an immense falling-off for a district so small as Palermo.

Woollens.

Woollen goods have fallen-off slightly, while silk goods have risen by 2,682*l.* I do not think it extraordinary that silk goods should have so risen, for the fall in demand of silk goods last year in consequence of the depreciation of commerce was very great—the better sort of people were economising; this last year's confidence reviving a little, and the former economies being exhausted, the women of the more well-to-do sort have renewed their wardrobes for themselves and their children, while the poorer classes, who have suffered most, have not yet had courage to resume their old form of expenditure.

Linens.

The import of linen, also an article of luxury in Sicily, has risen too.

Coal.

Coals remain the same, while imports of iron machinery and colonials have fallen. Metals have risen, as have also miscellaneous articles.

Machinery.
Metals.

The causes of all the variations of values in exports and imports must be as fixed as the causes for the rise and fall of the tides; it is clear that if the profits and wages in any branch of industry fall, the expenditure of all classes engaged in that branch of industry must fall also, and that the expenditure of people without capital cannot rise until they have had time to economise, which of course is a longer operation with the poorer than with the well-to-do classes.

PUBLIC WORKS.

Harbour
works.

The dredging and blasting operations are proceeding satisfactorily. The depth in the greater part of the "Northern Basin" has reached 22 feet, while near the Northern Mole it has increased to almost 30 feet.

Buildings, &c.

In view of the exhibition to be held next year, and for which great activity is being shown by the municipality and other public bodies, many new streets are being opened, old ones are being widened, levelled, and otherwise improved, and new houses are being erected, principally towards the north-western part of the town, which is considered the healthiest. The plans of the "Risanamento" of the town having received the approval of the Government, and the difficulties in the way of loans, &c., having been met with, great hopes are being entertained that the old unhealthy quarters of the town will disappear and be replaced by "open spaces" and wide streets supplied with drainage and abundant water.

Water supply.

It is hoped that the question of the water supply of Palermo has made a great step in advance. The deficiency of the water supply, especially in summer, when water is most needful,

has long been one of the great grievances of the householder in Palermo. The supply at present is meted out in "penne," that is, "quills of water"—a "penna" being supposed to be a continuous supply of as much water as will run through a pipe the size of a goose quill.

There are houses of three stories in Palermo inhabited by three or four families who have no more than a supply of one penna of water per diem, and even this at times intermitted, for the "maestri d' acqua," or men who have the care of the water pipes, contrive when water is required for purposes of irrigating orange and lemon trees and melons to divert, for a consideration, the course of the water-flow from its proper destination.

Many gardens, however, are watered by means of steam pumps and "norie," which pump up the water from wells.

The running water with which Palermo is mainly supplied comes chiefly from sources in the hills near Monreale. The system by which the distribution of the water is achieved in Palermo is very curious, and is said to have come down from the days of the Arabs. Visitors, making excursions in the environs of Palermo, have often been puzzled by the appearance along the roads from time to time of strange structures in the form of lofty truncated obelisks. These are called water-towers, and some of them are very ancient, built of stone and overgrown with ivy; there is usually an iron ladder reaching half way down by which the water masters, who carry portable ladders to join thereto, can get to the summits. On the top of each tower is a small reservoir into which the water rises from the pressure of the water descending from the mountain, and from the reservoir the water is distributed in pipes to the neighbourhood. The explanation of the use of these towers is not very clear, but engineers say they act as a drag on the rush of water in the earthenware conduits and prevent them from bursting.

As mentioned here and in previous reports, the inhabitants of Palermo have long had cause for complaint as to the scanty supply of water for the Sicilian capital. The news, therefore, of the formation of an Anglo-Palermite company for the supply of water from a copious source at Scillato, some 20 miles distant, has been greeted with much satisfaction.

During the past year the line which is to connect Caltagirone, Railways. a prosperous town in the centre of the island, to Valsavoja, near Catania, has been opened as far as Scordia, a distance of 13 kiloms., and the remaining distance of 53 kiloms. is being actively pushed forward.

The Siracusa-Noto line still appears to be under study, owing to modifications that have been proposed to meet the wishes of the inhabitants of some of the intermediate places.

The Circum-Etna is also a project still, and differences have arisen between the parties connected with its construction.

A steam tramway is now running between Messina and the Faro, and another is projected between Palermo and Monreale.

The belief, as mentioned in my last report, that brigandage on Public security.

the grand scale had been wholly suppressed in Sicily has been somewhat shaken of late by recent acts of aggression. Isolated acts of highway robbery have occurred from time to time, including the robbery of mail coaches as well as of individuals; but such robberies might have occurred in any country with more or less frequency. A recent case, however, has occurred to shake this belief. A proprietor near Termini was carried off to the mountains by a band of brigands disguised as "Carabinieri," and kept a prisoner for three weeks in a grotto until his ransom-money was paid. The brigands at first demanded 30,000 ounces, about 15,000*l.*; but reduced this demand to 10,000*l.*, and finally accepted 5,000*l.*

The affair is still under investigation, many arrests have been made, and it is rumoured that the "manufengoli in guanti gialli," as the supporters of brigandage in the towns are called, have been largely mixed up in the conspiracy, one of the leading barristers at Termini has been put in prison on suspicion, and 20 arrests in all have been made.

The central Government has apparently seen reason not to be satisfied with the police activity in the way either of prevention or discovery, for they have changed the "questore," or police superintendent, at Palermo.

The men accused of the acts of brigandage mentioned in my last report as having taken place two years ago in the district of Trapani, when an attempt was made to carry off Signor Zalapi, the Syndic of Piana dei Greci, and which resulted in the murder of his son, were brought to trial lately, the accused were 26 in number, but the jury only found one guilty.

There is doubtless a great feeling of insecurity in the interior of the country, every proprietor goes armed and on horseback, and those who have "campieri," or armed guards in uniform, never stir without them, and ladies and children even taking walks in the neighbourhood of their country houses never stir or set out of doors except under the protection of "campieri."

In the town of Palermo a more than usual amount of street robberies and burglaries have taken place, and the inhabitants have raised demands for increased vigilance on the part of the police, and an augmentation of their number.

MESSINA.

Mr. Vice-Consul Rainford reports as follows:—

Trade and
commerce.

The statistics this year show a decrease in the following principal articles of commerce: sugar, iron, pig-iron, coals, wheat, and flour; while the following articles have increased: mineral-oil, cotton-goods, codfish, and herrings. The amount of importations, compared with those of last year, show a diminution in value of 92,080*l.* Coals, on account of the Italian Government, arrived at this port, in English vessels, between July 23 and October 7, 1889, to the amount of 13,891 tons. Of the articles exported, olive oil shows a serious falling-off since last year, the diminution

being 62,585 cwts.; lemons have also seriously decreased, being 117,306 cwts. less.

The total value of all exports is less than that of last year by 108,422*l*.

The British vessels which arrived at the port of Messina in the year 1889 were 416, their total burthen being 404,095 tons. Of this number, 29 were sailing vessels, with a tonnage of 3,650, and 387 steamers, with a tonnage of 400,445. As compared with those of 1888 there was one sailing vessel less, but an increase in the tonnage of 260, and four steamers more, with an increase in the tonnage of 27,647. Shipping and Navigation.

The total number of ships of all nations which entered into the port of Messina was 3,533, their tonnage being 932,958.

The lemon trees are infested with an insect called "pidocchio," or louse. This is a most serious infliction; it covers the fruit with a black larva, which renders it quite unfit for exportation. I attribute this and similar pests to the wholesale destruction of small birds. I have seen at a poulterers from 100 to 150 robins, linnets, thrushes, and similar birds nearly every morning; the flesh of one of these birds weigh but a few grains. Agriculture.
Lemon trees.

In this province there are about 1,427 acres of vineyards more or less infected by phylloxera, being a considerable diminution of the disease, owing to the vigorous action and judicious precautions taken by the Government. Phylloxera.

The railway between Messina and Cerda, commenced in 1883, has been opened as far as S. Filippo, distant from Messina about 24½ English miles; this portion of the line was opened on June 18. The great Peloritan tunnel is a magnificent engineering work, executed by the late Cav. Emilio Bianchi. The mountain was pierced under the greatest difficulties, the irruption of water was excessive, and several times the works had to be suspended. The length of the tunnel is nearly 3½ English miles, pierced through the hardest rock; it occupied six years in construction. Public works.
Railway.

A steam tramway between Messina and Barcelona, about 28 English miles in length, was commenced in the month of December, 1889, and is progressing with great rapidity. Between Messina and Torre del Faro it passes along the coast, and is generally but a few yards distant from the sea. After Torre del Faro the line leaves the sea-shore and goes inland. Tramway.

There are 14 new forts constructed, or in course of construction, for the defence of Messina and the Straits; five are already finished and armed, the rest are rapidly approaching completion. Forts.

It is my duty to again call attention to the strange administration of justice in this city. On November 20, 1889, at 8 p.m., a man was found leaving the cabin of the steamship "Coventry," of West Hartlepool, A. Wilson, Master; he was loaded with objects and linen, which he had robbed on board, he, having broken open several lockers, was arrested by the crew, handcuffed, and then taken to the Questura (police office), where the police on guard refused to receive him or listen to the charge. General remarks.
Public safety.

He was then taken back to the vessel, and kept in custody all night, and in the morning again taken to the Questura, and again the police refused to receive him or listen to the accusation, then nothing could be done but to liberate him.

Upon becoming acquainted with these facts, I wrote to the Questore (Chief of Police) complaining of the conduct of the guard, and received in reply a letter stating that the man Christian Olsen had been ill-treated on board, and handcuffed without any reason. Olsen, in a declaration written in English, declared that he had not been subjected to any ill-treatment whatever. I am not informed of the circumstances under which the Questore obtained Olsen's letter, or the statement that he had been ill-treated. I bring this case forward as an example of the mode in which public safety is protected. There is no summary jurisdiction whatever, one may be robbed or ill-treated, the only remedy is by citing the offender by a "*Querela*," which involves a heavy expense and the employment of an advocate, the result of this is that the lower orders feeling the utter hopelessness of obtaining justice, save by such expensive and harassing means, take the law into their own hands, and abundant stabbing and shooting is the consequence. There is scarcely a newspaper which does not contain accounts of murder or wounding. The reason I have given for this has not been formed by myself, but has been expressed by many native gentlemen and respectable persons.

Articles of
agreement.

The arrangement entered into between the Government of Her Majesty and the Government of His Majesty the King of Italy in March, 1889, by virtue of which British vessels, which do not remain in port more than 48 hours, need not consign their articles of agreement to the Consulate to obtain the certificate ("*Nulla Osta*") for the clearance outwards, renders the statistics relating to British vessels dependent upon the reports of the Italian authorities, to whom I have to apply for the number, tonnage, crews, &c., of vessels so arriving. I have continually to compare the Register of the Vice-Consulate with that of the Captain of the Port, in order to ascertain what number of vessels have arrived. From April 3 until December 22, 1889, 93 British vessels arrived at this port, with a tonnage of 86,720 tons, and manned by 2,185 persons, not one of which are entered in the register book at this Vice-Consulate, causing a loss to Her Majesty's Government of 35*l.*, according to Nos. 17, 37, and 43 of the Table of Consular Fees. At times an expense is occurred in consequence of distressed British seamen remaining at the charge of this Vice-Consulate, through unavoidable ignorance of the arrival of vessels upon which they could be shipped to England.

CATANIA.

Preliminary
remarks.

Mr. Vice-Consul Franck reports as follows:—

The improvement in general business during 1889 was

sufficiently marked to induce a large section of business men to look forward to a revival in trade and industry in this district.

The causes which had determined a serious crisis in the preceding year have to a certain point been removed, and although many still complain that the times leave much to be desired, yet, if we look at the general aspect of things, there is on the whole cause to be satisfied.

The commercial, agricultural, industrial, and financial crises that so much affected the province of Catania in the year 1887-88 causes much depression in trade at large, which more acutely touched both agricultural and industrial products, such as wine, lemons, and oranges, sulphur, and other articles forming the principal resources of the district.

This state of things gave rise to an unhealthy feeling both in the upper and lower classes of producers, manufacturers and exporters.

The last twelve months, however, have shown a marked improvement in the interchange of these articles, although it cannot positively be asserted that the district is regaining that prosperity which prevailed 10 years ago throughout the province.

The trade returns annexed to this report will show in themselves that a certain decrease both in the imports and exports has taken place in 1889, but some allowance must be made as regards the accuracy of figures resulting from the custom-house statistics, which in many cases cannot be taken as correct.

As far as sulphur is concerned it will be seen that the exportation underwent a decrease of 9,133 tons as compared with 1888, but the demand for this article became active about the latter part of December for shipment in January and February of the present year. These, of course, will appear in the returns for the next 12 months, but, properly speaking, were transactions effected in 1889. Prices of this article are certainly improving; in December last the demand became stronger.

Sulphur is looked upon as the most important and conspicuous of Sicilian products, and forms the essential resource of the island, being exported to all parts of the world.

A new system requiring no heavy expenses of plant and fusing, and no skilled assistance, has lately been introduced by Señor Lion Gil y Ruiz, engineer of the Royal Corps of Engineers in Spain, who first introduced it three years ago in the mines of Buen Viento Corre belonging to a company in Almeria (Spain) where, after several trials, it obtained a brilliant success.

Señor Gil came to Sicily last autumn seeking a larger field of operation for his invention, and in fact, at his own expense, he planted one of his furnaces on the Mughia mine, where, in December last, several experiments took place, resulting in a saving of 29 per cent. of sulphur as compared with the old mode of fusing through the Calchrone. Mr. Gil's system will undoubtedly be of essential service to the trade.

It may be here mentioned that in England, in recent years, an idea has found its way that Sicilian sulphur is sooner or later doomed to be excluded from foreign markets by the competition it will have to face in consequence of late chemical inventions dealing with the extraction of sulphur from the old refuse of chemical alkali works in the north of England.

The invention above-named is that known as the "Chance Process," which has been at work in Newcastle-on-Tyne for a considerable time; still Sicilian sulphur, as regards quantities exported, has not suffered from it.

Professor Travaglia, of the mining school of Caltanissetta, a gentleman more than competent in the matter, attaches no importance to the Chance Process for obtaining sulphur, and is confident that Sicilian production will still have its markets.

Industries
and public
works.

Industries continue to be carried on much the same as in former years, with no sign of real progress. The financial position of both commune and province is anything but flourishing; indebtedness is fast increasing, local taxation on all commodities is heavy, consequently the development of industrial investments cannot find easy openings.

The Circum-Etna Railway is still a plan on paper, and before the works have begun grave differences have arisen between the parties contracting to carry out the work.

Shipping.

Annex A. will show that there is a decrease in the total number of ships entering this port as compared with the preceding year. British shipping, however, keeps up a salutary position, and if there is a diminution of 19 vessels in the arrivals, on the other hand, we have an increase of tonnage or in size of 2,743 tons. The total number of British ships entered in 1889 came up to 229 vessels (steamers), with an aggregate tonnage of 227,700, of which only a part were entered in the register of this Vice-Consulate, whereas, since April last, the deposit of ship's articles at the British Consulates, was only made necessary in the case of a British vessel remaining in an Italian port over 48 hours. Thus, Consular officers, virtually speaking, have no control over the shipping of the nation they represent in Italian ports. The great irregularity and inconvenience arising therefrom is obvious to any one acquainted with Consular duties and official prestige, and the system thus lamented should be repealed.

Thus, dating from April last, 43 British ships, showing a tonnage of 28,896, did not in a direct way come before the notice of this office.

Freights.

Freights during the latter part of the year have been a shade easier to those existing in 1888, and from 12s. 6d. per ton on an average, have fallen to 10s. or 10s. 6d. outward, chiefly coals.

Inward freights (Catania to United Kingdom) have kept up steady on the basis of 15s. to 20s. per ton general merchandise, marking a decided improvement to the rates ruling two or three years back.

Catania port.

The city of Catania is situate in the gulf of the same name,

comprised between Cape Santa Croce and Cape Molini, the one distant from north to south about 18 miles from the other, facing the east slopes of Etna.

The length of the bay is about 5 miles, the ground from the south to Catania lighthouse is sandy, and from the lighthouse, turning towards north, the city is almost entirely surrounded by black lava, giving it a gloomy appearance.

Catania possessed in olden times a harbour well known as "Il porto d' Ulisse," and, according to Virgil, owing to the many eruptions from Etna, which altogether altered the topographical aspect of the city, it lost all that beauty of scenery that nature had bestowed on it, and lost also its former port, to the detriment of its commercial shipping resources.

The old was destroyed in 1438, and a second was constructed in 1601, which was completely carried away by a memorable storm before it could be finished. In 1634 the works of that same harbour were resumed with strong efforts, but even this new trial proved fruitless, the sea having once more played its ravages. Catania remained without any shelter for vessels up to the year 1782, when the still existing old harbour was raised, but, two years after, it was partially destroyed by storms, and it was only in 1842 that a Maltese engineer, named Giuseppe Zhaara, recommenced, under better and proper means of construction, those works, and so accomplished the small inner harbour, which can be seen up to the present day.

In 1872 the increasing commercial development of Catania called for a more spacious and safe harbour, and it was at that time that the present port was commenced, and now can be said to be complete, offering good and efficient shelter to vessels of any size.

The following particulars may be found useful as general information:—

						Metres.	Inner or old harbour.
Depth of water, maximum	..	..	..	..	..	7	
" " minimum	..	..	..	..	..	3	
" " alongside the quay, maximum	..	..	..	..	..	8	
" " " " minimum	..	..	..	..	..	3.40	

The quays, with landing-places, have an extent of 430 metres, with draught of water as follows:—

240 metres, with 7 to 8 metres of draught.
102 " " 3.50 metres of draught opposite the custom-house.
58 " " 2 metres of draught opposite wet dock.

The zone for moorings is about 200 metres, and the entrance New harbour, or mouth of the harbour measures 400 metres wide.

Total length, 1,336 metres.

Capacity or size of the new port for commercial operations, 83,004 cubic metres.

Size of the outer harbour, 428,148 cubic metres.

Draft along the quay, 7 metres.

(953)

B

Depth of basin, inner part, 8 to 15 metres.

Depth of basin, outer part, 12 to 17 metres.

The length of the quays, when totally completed, will measure 11,000 metres.

The wharfs have a length of 60 metres, and a breadth of 25 metres, the distance from the extremity of the two wharfs measures 220 metres.

The width of the outer harbour's entrance measures 700 metres.

There is no tide worthy of mention in Catania harbour.

The winds affecting most the port of Catania, and which sometimes raise inside of it a heavy nasty sea, are the south and south-east winds. The north-east wind also raises a strong and dangerous strain. The principal lighthouse is fixed on the Sciarra Biscari, and there are besides three others of minor importance.

The regulations respecting the port of Catania are the same as those applied to all harbours in Italy, and based on the Mercantile Naval Code of November 20, 1879.

Pilotage.

There is a body of pilots composed of eight members, who are practical local pilots, and who act under a caution deposit of 800 lire. Pilotage is not compulsory, and vessels of any flag can enter or leave the port without pilots. Pilots' fees range from a minimum of 15 lire to a maximum of 55 lire per vessel, according to tonnage.

Water supply.

There are two barges with fresh water-tanks to supply vessels with water at a cost of 2 lire per each ton of water inside the harbour, and at 3 lire outside.

Vessels can also provide themselves with water, making use of their crews and boats.

LICATA.

Mr. Vice-Consul Giglio reports as follows :—

Although the movements in British shipping on the previous year gave a grander total, still general shipping this year proved to be satisfactory and perhaps better, owing to general commerce in Licata developing from year to year.

Among foreign vessels the British flag predominates, always showing a total, including three Maltese craft boats, of 42 vessels, representing a tonnage of 38,319 tons register, having entered the port during the year just elapsed, of which one vessel, measuring 1,485 tons, cleared on January of this year.

Exportation.

Owing to the demand from abroad, and especially from France, America, Russia, and Italy, the brimstone exportation has given the last year an increase of 10,705 tons to that of the previous year in the following proportion :—

							Tons.
Brimstone exportation in 1889 ..	..	..	..	..	..	..	89,540
" " 1888 ..	..	..	..	..	..	..	78,885
Total ..	..	..	..	..	..	..	10,705

The brimstone exported to England in 1889 amounted to 1,400 tons.

The importation has likewise remarkably increased in some articles, viz., petroleum, corn, &c., but diminished in coal, which in the previous year proved to be on an increasing scale, showing a total of 13,500 tons, while during the last year 7,590 tons only were imported; and this, in my opinion, is owing to the raising of freights and prices of the mineral in England.

Consequently, as I hinted at above, British navigation has been scarcer than in the previous year, notwithstanding that in 1889 British vessels show a greater tonnage, viz., 38,319 tons register, while in 1888 the total tonnage represented a figure of 38,200 tons register only.

The harbour works, notwithstanding the visit we had here of two Ministers, the Minister of Finance and that of public works, proceed, as I had to lament in previous years, slowly.

They promised, among other things, the completion of the breakwater to secure a good shelter, the dredging of the harbour to let vessels of all sizes profit by this shelter, a landing place—for I must remark that the way to put ashore a shipmaster or passenger is to let him go astraddle a poor lighterman, no conveyance existing in Licata—which useful works were to be completed during 1889. But I am sorry to say that when the weather is bad, or slightly so, vessels measuring from 15 feet up are compelled to haul off from the breakwater and stop work, sustaining great losses to the detriment of shipowners, and of all concerned in general commerce.

Besides the necessity of having our harbour well dredged, another inconvenience is at hand which endangers the safety of many vessels calling at Licata, there is a small reef in the centre of the harbour, which sometimes, when more than two or three steamers call here, does not permit a vessel to veer.

The inconvenience just spoken of, and the buoy of the constructors of the harbour, caused a British steamer, the "Eagle," of Port Glasgow, official number 77230, to strand on the western pier of the harbour on the morning of October 5 last during a strong gale from south-east.

The works from Licata, to which I alluded in my previous report, have been commenced since July, 1889, and continue with such alacrity that it is hoped by next January, or little later, the Licata-Terranova branch will be opened to the public, notwithstanding an overflow of the waters in the Talso has carried away a stone pier of the new bridge, and the constructors are compelled to rebuild the piers with a better foundation in the deep clayey bed of the river.

They say that before next summer the new station is to be

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Crops.

commenced, for which building the Società Ferroviare Sicula has assigned 48,000%.

In 1889 the quantity of the crops was :—

Articles.				Quantity.	
Wine ..	..	..	Gallons ..	215,000	
Olive oil ..	..	..	" ..	7,500	
Barley ..	..	..	Tons ..	3,500	
Corn ..	..	..	" ..	5,000	
Beans ..	..	..	" ..	1,500	
Almonds ..	..	..	" ..	250	
Carobs ..	..	..	" ..	45	
Sundries ..	..	..	" ..	230	

Improve-
ments.

Many improvements, of course, might be made in Licata, because its topographical position is far better than that of Girgenti, and by reason of its being, as a seaport, the best in position along the southern coast of Sicily; but much to my regret I must confess that few people in Licata study to improve their condition. Among these few people I am glad to point out the respectable firm of Matteo Verderame e figli—six or seven partners who, the father excepted, were all brought up in Switzerland and England—the most enterprising and clever gentlemen in the trade of Licata. To this firm Licata owes one of the first steam manufactories for macaroni and alimentary paste, corn and sulphur grinding, &c., which from year to year, striving against many competitors in other places of the island, is always improving. The whole machinery of the manufactory is of English make, and all imported from England. The enterprising capacity of the above-mentioned firm is not confined to this manufactory. They are, moreover, the first coal importers and exporters of sulphur and cereals in Licata, and have in lease two or three mines of sulphur, of which one lately acquired is a source of riches for them and Licata. If there were in this place two or three such enterprising firms, as desirous of increasing their wealth and of benefiting the people at the same time, then it would be my duty to say something on local improvements, and I should not be compelled to report that the streets here are dirty, the water bad, the architectural style preadamitic, and many other things which prove that Licata lives three centuries back from 1890.

GIRGENTI.

Shipping.

Mr. Vice-Consul Oates reports :—

There was an increase of 10 ships and 12,275 tons in the arrivals of all nations in 1889 over those of 1888, the respective numbers being 262 ships and 162,636 tons in 1889, and 252 ships with 150,361 tons in 1888. The British shipping, however, shows a

decrease, for in 1888 they were 120, while in 1889 they were 112; but the tonnage in 1889 is higher by 4,507 tons: in 1888 it was 95,569 tons, and in 1889, 100,076 tons.

The exports of brimstone and import of coals have risen.

147,131 tons, valued at 441,393*l.*, were exported; namely, an increase of 5,029 tons, equal to 69,609*l.* over 1888. Exports and imports. Brimstone.

The shipments of this article were, for 1889 and 1888, as follows :—

	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Great Britain	16,400	49,200	13,310	36,926
France	32,433	97,299	26,727	69,490
Germany	5,788	17,364	2,086	5,423
United States	72,681	218,043	74,775	194,415
Other countries	19,829	59,487	25,204	65,530
Total	147,131	441,393	142,102	371,784

From this table it will be seen that the value rose from 2*l.* 15*s.* 6*d.* per ton, in 1888, to 3*l.* per ton in 1889.

The 16,400 tons shipped to Great Britain were thus distributed :—

	Tons.
London	8,030
Glasgow	3,970
Swansea	3,226
Llanely	823
Cardiff	250
Bristol	101
Total	16,400

This was the only article imported, and the amount was Coal. 13,630 tons, valued at 13,630*l.* There was an increase, in 1889, of 3,281 tons, valued at as many pounds, as compared with 1888.

MAZZARA.

Mr. Vice-Consul Favara reports that the total value of exports for 1889 was 13,500*l.*, of which Malta took 11,624*l.*, and Tunis the remaining 1,876*l.*

The exports consisted of :—

	£	Exports.
Wine	11,233	
Cheese	1,220	
Oil	809	
Fruit	143	
Fish	71	
Sundries	24	
Total	13,500	

The imports amounted to 143*l.* only, and consisted of dry fish, earthenware, fruit, wool, and fish-hooks from Malta. Imports.

MARSALA.

Mr. Vice-Consul Gray reports as follows :—

Trade and
commerce.

The value of the exports and imports shows a slight increase as compared with that of last year, which in the former case may be attributed principally to the very large quantity of common wine shipped during the summer, and especially to Malta, in order to avail of the drawback on wines over a certain strength, which had been accorded by the Italian Government, and as the wines of 1888 vintage were by nature of unusual alcoholic strength the Government were paying a very heavy drawback on wines to which no spirit had been added, and consequently on which they had received no taxes. The rupture of Treaty negotiations with France still causes a decrease in all business transactions with that country.

Shipping and
navigation.

Though the number of vessels falls considerably short of last year, the relative difference in tonnage in the two years is not very great. The Italian shipping shows a large increase.

General
remarks.

The 1888 vintage, though only fairly good as regards quantity, was an unusually good one for quality, and the alcoholic strength of the wine was greater than it has been known to be for a number of years. Notwithstanding the good quality, prices were very low, and had it not been for the drawback accorded by Government, owners would have experienced considerable difficulty in getting rid of their wine.

MILAZZO.

Shipping.

Mr. Vice-Consul Trifiletti reports a falling-off in foreign vessels in 1889 as compared with 1888, due to the decreased exportation of wine and the small export of fruit.

Wine.

Fruit.

Fruit was not so abundant, owing to scarce crops; the demand from abroad also fell, and producers preferred to dispose of their produce on the spot.

Coasting
trade.

This trade has been somewhat brisk, as a great deal of the wine exported went to Italian ports for transmission to Germany and Switzerland overland.

Other articles.

Grain, oil, coals, cattle, &c., have remained almost stationary.

Railways.

A portion of the line between Milazzo and Messina, viz., from Messina to Santa Lucia, has been opened to traffic, and it is hoped that the whole line may be completed by the middle of 1890. The remaining portion of the line from Milazzo to Cefalù and Palermó is being worked with tolerable speed, though trade and passenger traffic demand greater alacrity in the works.

TRAPANI.

Shipping.

Mr. Vice-Consul Marino reports that there has been an increase in the shipping of all nations in 1889. The increase is only of five vessels, but with a decrease of 3,602 tons. British shipping fell both in number and tonnage, and so did German, Greek, Russian, and Austrian, while Italian and Norwegian increased.

Increased from 75,793*l.* to 88,115*l.*, the increase being in salt, Exports. wine, wine-casks, stones, cheese, and other articles.

Likewise rose from 225,995*l.* to 291,182*l.*, contributed to by Imports. cereals, oil, alcohol, cattle, timber, petroleum, &c.

From the returns it appears that in 1889, as compared with 1888, Great Britain imported more from Trapani, but exported less. Tunis did the same, while Turkey and Austria imported less and exported more. The United States and Germany both imported and exported more. The trade with Sweden, Russia, Brazil, &c., remained about the same.

RETURN of all Shipping at the Port of Palermo in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	6	841	401	444,959	407	445,800
Italian	1,956	84,886	1,195	610,977	3,151	695,863
German	...	...	32	33,366	32	33,366
Dutch	...	...	22	16,984	22	16,985
Belgian	...	...	10	12,618	10	12,618
Greek	11	4,314	1	1,077	12	5,391
Norwegian	...	...	8	4,819	8	4,819
French	...	...	4	4,815	4	4,815
Austrian	6	2,728	...	...	6	2,728
Danish	...	...	2	1,720	2	1,720
Spanish	2	287	...	...	2	287
Other countries ...	3	529	1	1,125	4	1,654
Total	1,984	93,595	1,676	1,132,461	3,660	1,226,046
" for the preceding year ...	1,859	90,787	1,542	1,085,602	3,401	1,176,389

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	6	841	401	444,947	407	445,188
Italian	1,862	74,814	1,207	623,517	3,069	698,631
German	...	...	30	29,721	30	29,721
Dutch	...	...	21	15,780	21	15,780
Belgian	...	...	10	12,618	10	12,618
Greek	11	4,314	11	4,314	12	5,391
Norwegian	...	...	8	4,819	8	4,819
French	...	...	6	5,820	6	5,820
Austrian	6	2,728	...	...	6	2,728
Danish	...	...	2	1,720	2	1,720
Spanish	2	287	...	...	2	287
Other countries ...	3	529	1	1,125	4	1,654
Total	1,890	83,513	1,687	1,140,844	3,577	1,224,357
" for the preceding year ...	1,740	79,559	1,531	1,005,188	3,271	1,084,847

RETURN of the Principal Articles of Export from Palermo
during the Years 1889-88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Green and dry fruit			£		£
Sumach	Cwts.	709,480	625,162	1,378,015	590,793
Sulphur		127,640	302,736	671,125	427,819
Oils	Gallons	183,238	6,181	84,912	17,344
Cereals	Bushels	262,828	39,314	159,968	52,046
Manna	Cwts.	2,277	49,228	213,030	47,331
Tartar		40,094	18,510	2,220	22,597
Animal produce			207,040	38,203	97,286
Lemon juice	Gallons	17,607	36,543		18,317
Wine		239,690	8,614	5,372	3,302
Other articles			13,544	155,496	11,309
			36,019		38,626
Total			1,342,891		1,326,770

RETURN of the Principal Articles of Import to Palermo during
the Years 1889-88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Cotton goods and yarns	Cwts.	8,400	£		£
Woollen		3,098	51,180	10,225	99,506
Silken		61	50,852	3,117	61,633
Linen		6,102	8,672	270	5,990
Coals	Tons	119,800	33,416	6,068	14,060
Cereals and vegetable produce	Bushels	480,035	110,280	112,633	108,122
Hides and skins	Cwts.	2,848	121,072	712,665	139,416
Animals and their produce			23,392	3,382	35,770
Petroleum	Gallons		40,537		73,743
Colours and dyes	Cwts.	733,612	25,344	665,830	24,212
Iron	Tons	10,846	5,520	2,372	4,343
Metals	Cwts.	4,923	46,304	5,444	57,921
Machinery		21,546	25,952	48,825	14,490
Glasware		5,908	11,808	96,986	22,775
Timber and furniture		42,488	14,070	103,954	13,205
Colonials		278,632	48,312	156,506	30,740
Chemicals		6,533	26,207	22,410	64,526
Other articles		4,095	3,292	7,319	3,013
			185,757		118,751
Total			732,167		892,216

TABLE showing the Total Value of all Articles Exported from Palermo and Imported to Palermo from and to Foreign Countries during the Years 1889-88.

Countries.	Exports.		Imports.	
	1889.	1888.	1889.	1888.
	£	£	£	£
Great Britain	372,124	318,552	327,203	375,693
France	159,774	215,486	74,686	82,548
Germany	22,035	38,646	62,467	83,117
United States	581,637	568,060	58,948	90,090
Austria	50,143	34,775	55,153	73,271
Holland	97,926	83,225	6,141	20,139
Turkey	3,808	7,549	45,996	89,923
Russia	3,360	7,757	71,340	54,830
Belgium	9,698	5,497	16,097	7,017
Other countries	42,336	17,223	14,125	15,583
Total	1,342,891	1,326,770	732,167	892,216

RETURN of all Shipping at the Port of Messina in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	29	3,650	387	400,445	416	404,095
Italian	1,944	111,089	1,276	692,352	3,220	803,421
Greek	156	37,816	13	10,073	169	47,894
German	1	238	39	24,449	40	24,687
Austrian	18	3,198	10	5,222	28	8,420
French	2	221	...	...	2	221
Other countries	10	1,390	64	46,925	74	48,315
Total	2,160	157,582	1,789	1,179,471	3,949	1,337,053
" for the year preceding	1,663	112,435	1,689	1,080,467	3,352	1,192,902

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	29	3,650	384	397,313	413	400,963
Italian	1,905	103,671	1,269	687,459	3,174	791,130
Greek	149	36,313	13	10,073	162	46,391
German	1	238	38	23,598	39	23,776
Austrian	15	2,571	10	5,222	25	7,793
French	2	221	...	...	2	221
Other countries	7	1,004	62	45,720	69	46,724
Total	2,108	147,668	1,776	1,169,330	3,884	1,316,998
" for the year preceding	1,611	106,143	1,679	1,075,365	3,290	1,181,508

RETURN of Principal Articles of Export from Messina during
the Years 1889-88.

Articles.		1889.		1888.	
		Quantity.	Value	Quantity.	Value
			£		£
Wine	Gallons...	669,933	36,122	762,555	41,178
Olive oil	Cwts. ...	51,596	125,693	114,181	278,154
Essences	" ...	5,641	177,527	4,542	184,394
Argol and wine lees	" ...	121,059	368,634	122,908	313,358
Lemon juice	" ...	48,863	94,313	27,463	52,964
Oranges and lemons	" ...	896,869	327,723	1,014,175	370,586
Almonds	" ...	16,990	50,014	17,136	20,872
Walnuts and filberts	" ...	68,922	76,954	54,371	60,706
Dried fruits	" ...	4,331	3,076	3,983	3,876
Seeds	" ...	3,647	4,279	5,647	2,866
Other articles	" ...	...	186,579	...	231,180
Total	...	...	1,451,214	...	1,569,636

RETURN of Principal Articles of Import to Messina during the
Years 1889-88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Spirits	Gallons ...	1,200	94	1,511	119
Mineral oil	Cwts. ...	26,206	11,704	22,965	10,256
Coffee	" ...	3,089	13,172	3,028	12,902
Sugar	" ...	19	16	210	190
Cotton goods	" ...	6,624	43,416	5,377	32,745
Woollen "	" ...	626	12,151	673	12,302
Hides and skins	" ...	11,290	36,831	10,299	62,724
Iron	" ...	22,764	7,622	30,752	9,364
Pig-iron	" ...	9,466	1,345	41,733	5,930
Steel	" ...	104	212	40	12
Window glass	" ...	3,186	1,663	3,066	1,476
Coals... ..	Tons ...	48,780	45,594	60,220	56,234
Wheat	Imp. Qrs....	104,861	210,393	112,936	226,600
Rice	Cwts. ...	104	57	230	119
Flour	" ...	177	111	24,271	15,274
Stock, codfish, and herrings	" ...	49,580	60,319	33,985	41,394
Other articles	" ...	...	281,935	...	330,979
Total... ..	...	...	726,540	...	818,620

RETURN of all Shipping at the Port of Catania in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Italian	1,543	64,917	681	498,015	2,224	550,932
British	1	175	229	228,980	230	229,155
Greek	68	11,652	8	5,126	76	16,778
German	1	159	26	23,771	27	23,930
Other nationalities	29	7,085	46	32,077	75	39,162
Total	1,642	83,988	990	775,969	2,632	859,957
" for the year preceding...	3,129	109,967	848	635,299	3,977	745,266

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Italian	1,536	64,136	681	486,015	2,217	551,928
British	1	175	228	227,628	229	227,700
Greek	71	11,990	8	5,128	79	17,116
German	1	159	26	23,771	27	23,930
Other nationalities	29	7,085	45	31,797	74	38,882
Total.	1,638	83,545	988	774,234	2,626	858,656
„ for the year preceding...	3,102	103,961	838	640,879	3,940	744,840

RETURN of all Articles of Import to Catania during the Years 1889-88.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Colonials	78	5,786	123	7,326
Paint and colours ..	825	11,315	892	10,058
Linen and jute goods ..	253	9,016	397	18,831
Cotton goods	417	64,132	670	98,471
Woollen goods	48	21,059	97	42,794
Silk goods	4	8,038	5	15,800
Paper goods	111	6,997	105	4,031
Iron and metal goods ..	5,411	54,130	4,516	55,749
Hides and leather goods	579	67,254	410	38,454
Coals	47,768	44,372	34,158	31,422
Pulse and dried fruit ..	28,775	258,343	28,275	234,049
Live stock	255	16,757	688	28,652
Sundry goods	4,636	76,976	1,334	116,750
	89,160	644,175	71,670	702,387

RETURN of all Articles of Export from Catania during the
Years 1889-88.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Sulphur	117,708	353,109	126,836	395,728
Olive oil	9	993	8	2,669
Aloe juice	7	487	300	16,828
Tartaric salt	120	7,217	170	10,193
Linseed	320	3,234	1,071	15,197
Tannic acid	..	..	..	..
Woollen goods	3	1,356	1	280
Rags	7	92	2	48
Worked cork	2	336	18	1,076
Prepared hides	42	6,980	32	1,922
Wine	537	9,879	756	11,106
Stone for construction	6,602	7,463	4,889	9,546
Wheat	781	6,264	1,914	3,221
Oranges and lemons ..	21,201	152,746	22,906	183,257
Shelled almonds	1,113	61,752	1,760	106,358
Walnuts and small nuts	1,091	20,437	885	21,283
Sundry seeds	338	6,236	374	6,743
Salt fish	89	2,870	35	1,199
Cheese	87	5,887	25	1,722
Sundry goods	4,482	39,297	946	8,676
Total	154,534	686,685	162,923	797,052

TABLE showing the Total Value of all Articles Exported from
Catania and Imported to Catania from and to Foreign
Countries during the Years 1889-88.

Country.	Exports.		Imports.	
	1889.	1888.	1889.	1888.
	£	£	£	£
Great Britain	123,261	126,084	172,273	232,126
France	49,627	84,085	50,266	95,959
America (U.S.)	109,470	155,363	12,712	25,283
Austria	132,433	153,566	47,166	60,164
Holland	14,382	26,193	4,144	7,544
Germany	51,187	75,552	56,462	30,530
Turkey	32,448	23,864	11,733	4,379
Other countries	173,877	152,345	289,419	246,402
Total	686,685	797,052	644,175	702,387

RETURN of all Shipping at the Port of Riposto within the Vice-Consular District of Catania in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Italian	317	13,441	84	48,795	401	62,236
British	...	...	20	15,074	20	15,074
German	...	...	3	2,301	3	2,301
Greek	1	235	4	3,028	5	3,263
Other nationalities	1	498	8	4,016	9	4,514
Total	319	14,174	119	73,214	438	87,388
„ for the year preceding...	319	18,627	242	169,301	561	187,928

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Italian	323	13,927	84	48,677	407	62,604
British	...	...	20	15,074	20	15,074
German	...	...	3	2,301	3	2,301
Greek	1	235	3	2,271	4	2,506
Other nationalities	1	498	9	4,391	10	5,889
Total	325	14,660	119	73,214	444	87,874
„ for the year preceding...	324	18,890	246	175,148	570	194,038

RETURN of all Principal Articles of Import to Riposto within the Vice-Consular District of Catania during the Years 1889-88.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Wine	27	36	793	921
Tartaric salt	9	245	29	1,974
Worked cork	..	..	..	..
Metal goods	30	259	9	102
Stone for construction..	2	12	10	65
Wheat	83	764	23	166
Coffee	1	91	..	..
Mineral oil	6	49	5	41
Pure spirit	1	2,016	1	2,916
Sundry goods	78	526	85	542
Total.. ..	237	3,998	955	6,727

RETURN of Principal Articles of Export from Riposto within the Vice-Consular District of Catania during the Years 1889-88.

Articles.	1889.		1888.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Wine	95,680	137,686	496,663	715,194
Aloe juice	..	..	..	..
Sulphur	..	..	82	276
Green fruits	4	164	..	..
Almonds	1	87	12	701
Oranges and lemons	..	..	..	..
Pure spirit	..	..	..	..
Sundry goods	112	592	168	816
Total	95,797	138,529	496,925	716,987

TABLE showing the Total Value of all Articles Exported from Riposto and Imported to Riposto, within the Vice-Consular District of Catania, from and to Foreign Countries during the Years 1889-88.

Country.	Exports.		Imports.	
	1889.	1888.	1889.	1888.
	£	£	£	£
Great Britain	10,257	..	1,185	56
France	120,974	705,666	69	3,480
United States	..	2,026	..	..
Austria	763	..	2,647	2,902
Other countries	6,535	9,295	97	289
Total	138,529	716,987	3,998	6,727

EXPORTS from Syracuse during the Year 1889.

Articles.	Great Britain and Colonies.		Austria.		Other Countries.		Total.	
	Quantity.	Value. £	Quantity.	Value. £	Quantity.	Value. £	Quantity.	Value. £
Fruits	33,067	6,613	..	..	..	..	143,130	19,822
"	..	..	..	13,209	..	..	..	8,307
Lemon and orange peel	5,538	8,307	110,063	..	..	..	5,538	16,080
Olive oil	670	16,080	..	..	..	..	670	1,900
Firewood	2,380	1,900	..	..	..	..	2,380	48,360
Wine	..	..	..	..	40,300	48,360	40,300	7,000
Olive husks	..	..	..	..	5,680	7,000	5,680	9,200
Locust beans	..	..	..	..	2,300	9,200	2,300	1,160
Almonds	..	..	..	..	30,000	1,160	30,000	6,444
Olives in brine	2,480	6,444	..	..	..	..	2,480	4,022
Salt	..	..	..	..	12,568	4,022	12,568	2,812
Linseed	..	..	..	..	250	2,812	250	..
Total.. ..	..	39,344	..	13,209	..	..	..	125,107

IMPORTS into Syracuse during the Year 1889.

Articles.		Austria.		Other Countries.		Total.	
		Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
Wheat ...	Kilos. ...	...	£	4,285,407	£	4,285,407	£
Petroleum ...	Boxes ...	...	...	15,784	13,889	15,784	13,889
Coal ...	Kilos. ...	...	...	4,622	5,547	4,622	5,547
Coffee ...	" ...	...	...	16,000	2,560	16,000	2,560
Sugar ...	" ...	...	...	56,000	3,360	56,000	3,360
Steel and iron	" ...	...	...	407,000	1,628	407,000	1,628
Electric plant	" ...	...	...	42,756	6,082	42,756	6,082
Deals ...	Tons ...	3,721	32,750	...	...	3,721	32,750
Cases and boxes	Packages	97,200	5,832	...	...	97,200	5,832
Paper ...	Bales ...	6,472	7,760	...	...	6,472	7,760
Codfish ...	Kilos. ...	...	...	125,000	2,500	125,000	2,500
Total ...	...	...	46,342	...	77,243	...	123,585

STATEMENT showing the Navigation at the Port of Licata for the Year ending December 31, 1889.

Nationality.	Entered.				Cleared.			
	Steamers.		Sailing vessels.		Steamers.		Sailing vessels.	
	Number.	Tons.	Number.	Tons.	Number.	Tons.	Number.	Tons.
Italian ..	103*	70,414	451	25,685	102	70,414	449	23,576
British ..	89	88,247	3†	72	88	86,762	3	72
German ..	17	17,318	..	..	17	17,318	..	..
Norwegian ..	5	1,323	..	..	5	1,323	..	..
Greek ..	3	1,893	2	530	3	1,893	2	530
French ..	4	2,400	..	..	4	2,400	..	..
Austrian ..	1	780	3	432	1	780	3	432
Danish ..	..	..	4	2,584	..	..	4	2,584
Swedish ..	1	714	1	478	1	714	1	478
Belgian ..	2	1,490	..	..	2	1,490	..	..
Portuguese ..	..	..	1	188	..	..	1	188
Turkish ..	..	..	1	100	..	..	1	100
Total ..	..	..	..	..	..	..	..	..

ITALY.

* The figure 103 ss. includes 100 Flore's boats.

† Maltese craft boats.

STATEMENT showing the Exports from Licata for the Year
ending December 31, 1889.

Articles.	Quantity.	Value in- cluding cost and charges.		Countries whither exported.
		Tons.	£	
Brimstone	26,571	74,399	France	
"	23,830	66,564	United States	
"	12,466	34,902	Russia	
"	7,891	20,617	Italy	
"	6,794	19,023	Portugal	
"	4,176	11,893	Belgium	
"	2,946	8,249	Germany	
"	1,526	4,273	Austria	
"	1,515	4,242	Spain	
"	1,400	3,920	Great Britain	
"	426	1,193	Sweden	
Beans	2,119	16,952	Spain	
Cereals	920	33,120	Great Britain	
"	740	7,140	Other countries	
Liquorice	598	8,372	" .. "	
Salt sardines ..	10	300	Great Britain	
Unwashed wool ..	90	470	Italy	
Sundries	520	1,950	Other countries	

STATEMENT showing the Imports into Licata for the Year ending
December 31, 1889.

Articles.		Quantity.	Value in- cluding cost and charges.	Countries whence imported.	Remarks.
			£		
Coal	Tons ...	7,590	7,500	England	No duty paid
Iron and steel ..	" ...	700	1,075	England and France	
Machinery	" ...	...	590	Austria	Weight unknown
Timber	Tons ...	1,571	8,640	"	No duty paid
Petroleum	Gallons	68,700	18,533	United States ...	Indirect
Corn	Tons ...	1,576	16,564	Russia	
Rice	" ...	47	625	Italy	
"	" ...	15	290	Great Britain	
Coffee	" ...	29	4,158	" ..	
Sugar	" ...	47	2,258	Italy	
Salt fish	" ...	18	779	Great Britain	
Sundries	" ...	5,067	3,685	" ..	

RETURN of British and Foreign Shipping at the Port of Girgenti
in the Year 1889.

ENTERED.

Nationality.	Direct.		Indirect.		Total.		Value.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British	12	9,508	100	90,668	112	100,076	£ 13,630
Italian	94	30,086	12	3,364	106	33,400	...
German	...	...	11	9,537	11	9,537	...
Austrian	...	...	6	2,692	6	2,692	...
Norwegian and Swedish	...	...	6	3,175	6	3,175	...
Dutch	...	...	5	3,746	5	3,746	...
Danish	...	...	4	2,982	4	2,982	...
French	4	1,359	1	67	5	1,426	...
Greek	...	...	3	2,248	3	2,248	...
Belgian	...	...	2	2,678	2	2,678	...
American	...	...	1	453	1	453	...
Spanish	1	223	...	...	1	223	...
Total	111	41,126	151	121,510	262	162,636	13,630

CLEARED.

Nationality.	Direct.		Indirect.		Total.		Value.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Total.	
British	39	16,785	73	83,291	112	100,076	£ 248,403
Italian	32	4,028	74	29,372	106	33,400	117,138
German	9	8,618	2	99	11	9,537	17,374
Austrian	1	96	5	2,596	6	2,692	10,494
Norwegian and Swedish	3	1,815	3	1,360	6	3,175	11,904
Dutch	5	3,746	...	...	5	3,746	2,025
Danish	...	...	4	2,982	4	2,982	4,317
French	5	1,426	...	...	5	1,426	7,230
Greek	...	...	3	2,248	3	2,248	12,464
Belgian	2	2,678	...	...	2	2,678	6,108
American	1	453	...	...	1	453	1,890
Spanish	1	223	...	...	1	223	1,147
Total	98	39,868	164	122,768	262	162,636	441,393

ENTERED.

Nationality.	With Cargo.		In Ballast.		Total.		Value.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British	10	8,100	102	91,976	112	100,076	£ 13,630
Italian	...	...	106	33,400	106	33,400	...
German	...	...	11	9,537	11	9,537	...
Austrian	...	...	6	2,692	6	2,692	...
Norwegian and Swedish	...	...	6	3,175	6	3,175	...
Dutch	...	...	5	3,746	5	3,746	...
Danish	...	...	4	2,982	4	2,982	...
French	...	...	5	1,426	5	1,426	...
Greek	...	...	3	2,248	3	2,248	...
Belgian	...	...	2	2,678	2	2,678	...
American	...	...	1	453	1	453	...
Spanish	...	...	1	223	1	223	...
Total	10	8,100	252	154,536	262	162,636	13,630

PALERMO.

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CLEARED.

Nationality.	With Cargo.		In Ballast.		Total.		Value.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	
British	88	91,514	24	8,562	112	100,076	£ 248,403
Italian	106	33,400	...	...	106	33,400	117,138
German	11	9,537	...	...	11	9,537	17,373
Austrian	6	2,692	...	...	6	2,692	10,494
Norwegian and Swedish	6	3,175	...	...	6	3,175	11,904
Dutch	5	3,746	...	...	5	3,746	2,925
Danish	4	2,982	...	...	4	2,982	4,317
French	5	1,426	...	...	5	1,426	7,230
Greek	3	2,248	...	...	3	2,248	12,464
Belgian	2	2,678	...	...	2	2,678	6,168
American	1	453	...	...	1	453	1,890
Spanish	1	223	...	...	1	223	1,147
Total	238	154,074	24	8,562	262	162,636	441,393

RETURN of all Shipping at the Port of Marsala in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
American, U.S.	...	...	...	...	...	...
British	75	3,269	31	23,429	106	26,698
Danish	...	...	5	3,816	5	3,816
German	...	...	4	4,436	4	4,436
Italian	1,438	46,400	201	83,411	1,639	128,811
Spanish	...	...	1	976	1	976
French	2	85	1	998	3	1,083
Total	1,515	48,754	43	117,066	1,758	165,820
" for the year preceding	1,790	47,984	252	112,052	2,042	160,036

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
American, U.S.	...	...	...	...	...	...
British	68	2,980	31	23,429	99	26,409
Danish	...	...	5	3,816	5	3,816
German	...	...	4	4,436	4	4,436
Italian	1,433	44,896	200	83,385	1,633	128,281
Spanish	...	...	1	976	1	976
French	2	85	1	998	3	1,083
Total	1,503	47,961	242	117,040	1,745	165,001
" for the year preceding	1,780	47,810	252	112,052	2,032	159,862

RETURN of Principal Articles of Export from Marsala during
the Years 1889-88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Cheese	Cwts. ...	237	£ 479	560	£ 1,522
Fruit (dried)	" ...	...	...	220	122
" (green)	" ...	85	46	40	13
Olive oil	" ...	25	67	870	2,186
Salt	Tons ...	50	22	200	100
Wine	Pipes ...	82,784	392,366	57,507	361,340
Wine lees (dried)	Tons ...	90	3,604	415	27,167
Other articles	...	...	80	...	462
Total	...	...	396,664	...	393,152

RETURN of Principal Articles of Import to Marsala during
the Years 1889-88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
Cattle	Head ...	262	£ 3,688	16	£ 50
Coals	Tons ...	6,793	8,066	2,974	2,736
Grain	Quarters ...	1,493	2,772	4,136	7,515
Iron	Tons ...	217	1,825	332	2,796
Petroleum	" ...	47	563	232	1,792
Spirit	Pipes ...	1,329	10,630	694	4,860
Staves	Mille ...	2,303	37,953	1,683	27,728
Sugar and Coffee	Cwts. ...	60	136	280	675
Other articles	...	...	1,276	...	655
Total	...	...	67,809	...	48,797

TABLE showing the Total Value of all Articles Exported from
Marsala and Imported to Marsala from and to Foreign
Countries during the Years 1889-88.

Country.	Exports.		Imports.	
	1889.	1888.	1889.	1888.
	£	£	£	£
America, United States ..	2,022	3,485	38,496	31,609
Great Britain and colonies ..	147,238	182,859	12,310	6,268
Italy	176,310	107,310	..	..
France	10,499	40,618	..	248
Germany and Russia ..	27,345	20,837	8,482	4,845
Tunis	14,410	33,988	5,838	5,492
Other countries	18,840	4,055	2,183	335
Total	396,664	393,152	67,909	48,797

SHIPMENTS of Wine in Pipes from Marsala in the Year 1889.

Country.	By Ingham, Whitaker and Co.	Florio and Co.	Woodhouse and Co.	Sundries.	Total.	
					1889.	1888.
To United Kingdom and colonies	2,073½	982½	1,893½	288	5,237½	4,186
Malta	24½	7	1,714½	22,876	24,622½	18,461
Germany, Russia and Baltic	489½	714½	218½	406	1,828½	1,477
France	105	238½	64	1,690	2,097½	7,645
Tunis	...	1½	...	5,522	8,233½	6,965
Other foreign ports	249½	842	21	1,598	...	...
Italian ports	1,356½	3,690½	623½	35,100	40,770	18,764
Total	4,298½	6,446	4,529½	67,480	82,783½	57,507

NOTE. - Messrs. Ingham, Whitaker and Co's. shipments consist solely of Marsala; Messrs. Florio and Co's of 3,876 pipes of Marsala, and 2,600 pipes of new ordinary wine, or Vino Grezzo; Messrs. Woodhouse and Co's of 2,729 pipes of Marsala, and 1,800 pipes of Vino Grezzo. The total of other shippers is almost entirely of Vino Grezzo.

RETURN of all Shipping at the Port of Trapani in the Year 1889.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	19	7,239	16	14,445	35	21,684
Swedish and Nor- wegian	12	2,274	36	20,152	48	22,426
Russian	2	1,264	...	...	26	1,264
Italian	16	6,364	10	4,531	10	10,895
Greek	7	1,547	2	1,508	9	3,055
American	2	2,062	...	...	2	2,062
French	1	31	2	832	3	863
Austro-Hungarian	1	98	...	...	1	98
Belgian	...	...	3	3,671	3	3,671
German	...	...	4	3,408	4	3,408
Spanish	3	323	...	...	3	323
Total	63	21,202	73	48,547	136	69,749
" for the year preceding ...	...	...	...	...	131	73,411

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	19	7,239	16	14,445	35	21,684
Swedish and Nor- wegian	12	2,274	36	20,152	48	22,426
Russian	2	1,264	...	...	26	1,264
Italian	16	6,364	10	4,531	10	10,895
Greek	7	1,547	2	1,508	9	3,055
American	2	2,062	...	...	2	2,062
French	1	31	2	832	3	863
Austro-Hungarian	1	98	...	...	1	98
Belgian	...	...	3	3,671	3	3,671
German	...	...	4	3,408	4	3,408
Spanish	3	323	...	...	3	323
Total	63	21,202	73	48,547	136	69,749
" for the year preceding ...	...	...	...	...	131	73,411

RETURN of Principal Articles of Export from Trapani during
the Years 1889-88.

Articles.		1889.		1888	
		Quantity.	Value.	Quantity.	Value
			£		£
Salt	Tons ...	63,798	24,455	86,173	35,546
Wine	Gallons ...	108,162	21,630	72,020	14,404
Resin	Tons ...	4	39	3	29
Planks	" ...	58	108	30	56
Charcoal	" ...	...	...	39	117
Empty casks	Number ...	100,000	22,500	44,756	10,630
Sparto ropes	Tons ...	45	1,260	63	1,768
Large stones for building	" ...	954	1,908	31	62
Grinding stones	Number ...	180	72	2,000	800
Potatoes	Tons ...	150	525	68	203
Macaroni	" ...	31	372	26	312
Seeds	" ...	2	36	8	144
Salted sardines	" ...	254	7,620	280	8,400
Cheese	" ...	50	3,700	31	2,294
Other articles	" ...	3,890	3,690	1,028	1,028
Total	...	...	88,115	...	75,793

RETURN of Principal Articles of Import to Trapani during the
Years 1889-88.

Articles.		1889.		1888.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Coals	Tons ...	9,648	9,648	10,468	10,468
Wheat	" ...	25,018	212,653	20,349	172,967
Olive oil	" ...	18	648	2	18
Alcohol	" ...	631	15,144	70	1,680
Petroleum	" ...	323	3,391	296	3,108
Iron bars, hoops, and plates	" ...	210	1,785	503	4,275
Zinc plates	" ...	3	66	3	46
Roof tiles	Number ...	1,881	3	12,240	20
Cotton clothes	Tons ...	1	320	14	480
Woolen	" ...	2	40	7	40
Sparto weed	" ...	298	4,172	323	4,522
Manilla ropes	" ...	...	...	8	416
Seeds	" ...	3	63	...	...
Cattle	Number ...	299	5,900	82	1,640
Horses, mules, and donkeys	" ...	170	340	229	458
Salt fish	Tons ...	516	1,548	4,059	12,177
Sponges	" ...	5	95	0	171
Empty casks	Number ...	200	36	137	25
Coffee	Tons ...	10	1,210	9	1,089
Bran	" ...	...	...	1	5
Common wood	" ...	2,298	19,533	1,625	3,035
Other articles	" ...	2,847	14,507	1,098	9,335
Total	...	...	291,182	...	225,995

TABLE showing the Total Value of all Articles Exported from Trapani and Imported to Trapani from and to Foreign Countries during the Years 1889-88.

Country.	Exports.		Imports.	
	1889.	1888.	1889.	1888.
	£	£	£	£
England	2,896	1,712	11,609	14,809
Turkey	3,150	10,694	212,653	172,967
Tunis	22,500	2,489	12,822	18,986
United States	10,792	9,002	3,391	3,108
Sweden and Norway ..	9,970	10,148	..	..
Russia	508	2,150	..	..
Brazil	800	968	1,210	..
Austria	1,750	2,143	19,533	3,035
Greece	1,222	435	..	..
Other countries ..	28,737	34,414	14,820	11,410
Germany	5,792	1,638	15,144	1,680
Total	88,115	75,793	291,182	225,995

RETURN of British and Foreign Shipping at the Port of Milazzo in the Year 1889.

ENTERED.

Nationality.	With Cargoes.			In Ballast.			Total.		
	Vessels.	Tons.	Crews.	Vessels.	Tons.	Crews.	Vessels.	Tons.	Crews.
British ..	10	9,598	208	27	23,427	516	37	33,025	724
French ..	..	..	..	2	2,039	55	2	2,039	55
Norwegian ..	..	..	..	2	892	27	2	892	27
Belgian ..	1	665	19	..	..	..	1	665	19
Austro-Hungarian ..	1	68	5	..	..	..	1	68	5
Greek ..	4	1,814	43	22	5,387	194	26	7,201	237
Turkish ..	..	..	..	2	717	19	2	717	19
Italian ..	614	64,908	5,817	1,028	136,821	8,420	1,642	201,229	14,237

CLEARED.

Nationality.	With Cargoes.			In Ballast.			Total.		
	Vessels.	Tons.	Crews.	Vessels.	Tons.	Crews.	Vessels.	Tons.	Crews.
British ..	25	21,673	476	12	11,352	248	37	33,025	724
French ..	2	2,039	55	..	..	..	2	2,039	55
Norwegian ..	2	892	27	..	..	..	2	892	27
Belgian ..	..	..	..	1	665	19	1	665	19
Austro-Hungarian ..	..	..	..	1	68	5	1	68	5
Greek ..	..	..	..	26	7,201	237	26	7,201	237
Turkish ..	..	..	..	2	717	19	2	717	19
Italian ..	970	115,110	8,020	672	86,119	6,217	1,642	201,229	14,237

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